



CERTIFIED GROUP EXERCISE INSTRUCTOR CERTIFICATION PROGRAM (CGI)

NAFTA BOARD OF DIRECTORS POLICIES AND PROCEDURES

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MISSION STATEMENT

NAFTA's mission is to ensure people have access to well-qualified health and fitness professionals and health coaches, and science-based information and resources on safe and effective physical activity, so they may get active, establish healthy behaviors, and live their most fit lives.

NAFTA is an education and training organization for fitness professionals. NAFTA is dedicated to offering certification programs and continuing education that teaches concepts and theories of health and fitness.

INTRODUCTION

National Aerobics & Fitness Trainers Association is located in Scottsdale, AZ and is a not-for-profit organization. NAFTA is committed to providing entry level credentialing for individuals who seek entry into the health/fitness industry.

NAFTA's certification is a scientifically based and psychometrically sound assessment exam designed to ensure an appropriate level of knowledge and skills to individuals who may not possess a related degree in the exercise sciences and/or who may have little or no prior fitness related experience. NAFTA Certification Exam Candidates can successfully prepare to enter the health/fitness field via adequate study time and exposure to health and fitness.

NAFTA recommends that a prospective candidate achieve exposure to health and fitness by attending group exercise classes taught by a certified exercise instructor at a local fitness facility or utilizes the services of a certified personal trainer depending on the certification desired. These are recommendations and should not be construed as eligibility requirements.

NAFTA Certified Group Exercise instructors are health/fitness professionals who lead apparently healthy individuals through safe and effective exercise classes according to recognized industry standards.

NAFTA Certified Personal Trainers are health/fitness professionals who perform client assessments and design safe, effective exercise and conditioning programs for apparently healthy individuals according to recognized industry standards.

NAFTA certified health/fitness professionals provide leadership to help the public achieve their personal health, fitness and performance goals. They hold a current emergency cardiac care (CPR) certification and are expected to respond appropriately in emergency situations. NAFTA certified health/fitness professionals do not diagnose and / or treat areas of pain or disease and will refer clients to other health care professionals / practitioners when appropriate. They are expected to abide by NAFTA's Code of Ethics at all times.

The NAFTA Board of Directors serves independently to uphold the stringent standards of professional certification and monitor the integrity of NAFTA's credentials, and to implement the standards, guidelines and policy created by the Certification Board regarding obtaining, (and/or maintaining), NAFTA's credential.

NAFTA ACADEMY

Although NAFTA Academy develops educational materials and training to assist candidates as they prepare to take NAFTA certification exams, the Academy is autonomous from the NAFTA Board, which is

the governing body that develops the exam. Any and all personnel responsible for working on the certification program are strictly prohibited from doing so on any activities having to do with exam preparation and/or

training and vice versa. NAFTA does not require purchase of any exam preparation or training materials from the Academy or other outside sources in order to sit for the exam from at least two years from their assignment. Additionally, candidates are not required to be a member of NAFTA or the Academy in order to be eligible to sit for the exam.

It should be noted that any and all educational services provided by the Educational Services Department are developed independently and are autonomous of those activities related to exam development.

BOARD OF DIRECTORS: CERTIFICATION GOVERNING BODY

Authority

NAFTA's Board of Directors (BOD) is the autonomous body responsible for the overall direction of the certification program. Directors are elected by the members of the Board pursuant to the association bylaws to provide oversight of the certification program. The BOD holds authority for all essential matters related to the fundamental areas of the certifications to include standards and exam development, approving passing standards, standards for eligibility, continuing education, appeals and disciplinary policy and decisions, and the selection of key personnel such as consultants and subject matter experts.

Responsibilities Of the Board of Directors

- Establish and implement policies and procedures that guide certification decisions.
- Establish, evaluate, and publish policies and procedures for the development, maintenance, administration, and scoring of the certification program, consistent with NCCA accreditation standards.
 - Key policies in this regard include:
 - BOD governance policy – terms, voting, etc.
 - Candidate eligibility and registration requirements
 - Testing accommodations
 - Eligibility requirements for volunteers and SMEs participating in exam activities
 - Exam development
 - Exam administration/proctoring
 - Exam scoring/reporting
 - Failed candidate retest and rationale
 - Recertification
 - Confidentiality/conflict of interest
 - Appeals
 - Record retention
 - Security
 - Candidate verification
- Review and/or revise policies and procedures at least once a year.
- Develop and maintain a valid, reliable and legally defensible assessment
 - Review/Approve expert panel of the BOD used to conduct periodic Job Task Analysis (JTA) study. The BOD will review and be responsible for the final selection of SMEs recommended by the Certification Board

- , assuring that autonomy remains in the selection process and that no undue influence exists regarding the selection process or the applicants recommended.
- Review/Approve the final JTA report and subsequent exam content outline as completed by the psychometricians.
- Review/Approve Cut Score/Standard Setting expert panel of SMEs used to set the cut score for the exam. The BOD will review and be responsible for the final selection of the SMEs recommended by the Certification Board, assuring that autonomy remains in the selection process and that no undue influence exists regarding the selection process or applicants recommended.
- Review/Approve the final Cut Score study report as recommended by the psychometricians.
- Approve final technical report as recommended by the psychometricians.
- Assure the trust of the public is served through the certification program
- Acquire, develop, disseminate, and preserve data and other valuable information relative to the functions and accomplishments of the BOD.
- Represent and include the interests of those parties and stakeholders affected by the certification program.
- Establish, evaluate, and implement requirements for certification and recertification for those who hold the credential.
- Uphold the mission of the certification program to address the financial services and consulting issues of certificants and the stakeholders whom they serve.
- Refer any complaints received that may concern certificant's conduct that is harmful to the public or inappropriate to the Board of Directors, the entity charged with enforcing the Association Code of Ethics.
- Oversee the administration of the certification program to including the program's personnel, policy implementation, and administrative procedures.

Fiduciary Responsibilities:

- **Duty of Care** – This duty requires that the BOD shall act in good faith and exercise their duties in a reasonable and prudent manner. The BOD is expected to be informed of issues within their profession and act on those issues in a way that would be deemed reasonable by their peers.
- **Duty of Loyalty (Conflict of Interest)** – This duty requires that the BOD shall put the interest of the certification program above their own, avoiding conflicts of interest. Sometimes there are conflicts of interest, and that is the time for board members to remove themselves from the discussion and/or decision. Decisions before the BOD must be made in the interest of the certification program they are representing.
- **Duty of Confidentiality** – This duty requires that members of the BOD shall respect the importance and sensitivity of information related to the exam that might come before the BOD. The BOD may have access to competitively sensitive information, information on new programs, and information on candidates. It is imperative that this information be kept confidential and not shared with anyone outside the BOD and its designated staff.
- **Duty of Obedience** – This duty requires that the BOD shall act in support of the certification program's Mission Statement. The Mission Statement is reviewed regularly and is adopted by the BOD.

Composition

The BOD will consist of at least seven (7) Directors which will be in good standing one of which will be a public representative. At least one of the voting directors are required to have the certification in order to represent credential holders in the profession. A staff liaison will be appointed to the BOD by the BOD Chairman. All Board members will have full voting privileges. The staff liaison will serve as an ex-officio member without having voting rights.

Terms

Terms of office will be three (3) years of service beginning January 1st and ending December 31st. Board members may serve no more than three (3) consecutive three-year terms of office. Terms shall be set initially on a staggered basis so as to prevent the entire BOD from being up for election/re-election at the same time. Once a Board member's last term has expired, they will be required to wait an additional three years in order to be eligible to serve on the BOD again for an additional three terms.

Chairman

Members of the BOD will elect a Chairman by majority vote from its current voting members. The Chairman's term of office will be two (2) years.

The Chairman shall preside over BOD meetings and with the aid of the staff liaison is responsible for meeting administration duties such as preparing meeting agendas, leading and documenting meetings, reporting findings to the staff liaison and scheduling annual BOD meetings.

The Chairman may delegate certain administrative tasks such as taking minutes to the staff liaison, subject to review by the Chairman and final approval by the BOD at its next meeting.

Vice Chairman

In order to assure smooth transitions of BOD Chairs, the BOD will elect a Vice Chairman by majority vote from the current voting members of the BOD. The Vice Chairman will move into the role of Chairman upon completion of the current Chairman's term. In the interim, the Vice Chairman will be responsible for leading meetings in the absence of the Chairman.

Secretary

The Secretary works under the supervision of the Board and is responsible for effective communications among the Board and accurately recording the motions and actions of the Board and maintaining those records. The Secretary is charged with providing timely and accurate communications to the Board regarding meetings, meeting minutes, and other duties as assigned by the Board. The Secretary must be in attendance for all BOD meetings.

Board Member Qualifications

Directors of the BOD should possess the highest personal and professional ethics, integrity and values, and be committed to representing the long-term interests related to certification program governance. Except for the public member, Each Director should possess a combination of skills, professional experience and diversity of viewpoints necessary to oversee the business of the association. At least one Director (public member excluded) should hold the certification credential and represent the certificant stakeholder contingency. The Board also requires that each Director be able to dedicate sufficient time to ensure the diligent performance of his or her duties on behalf of the certification program including attending all Board and applicable committee meetings.

Candidates for the BOD may be recruited by current BOD members, NAFTA personnel, certificants, vendor, or any stakeholder. In an effort to uphold the most current evidence-based practices and provide representation of current industry movement and public interests, nominees for positions on the board should have demonstrated leadership and experience in the health and fitness industry, a formal academic background in exercise science or related subject, and hold a minimum of one nationally recognized certification from an accredited agency. Notwithstanding, the Board considers the qualifications of members and board candidates individually and in the broader context of its overall composition and the associations current and future needs.

Any candidate in good standing shall be eligible for nomination as a BOD member if they:

- Do not serve in any capacity on any other board or committee of the certifying organization.
- Are not involved in the development of study guides, exam preparation courses or practice materials.
- Have not been subject to in the prior ten years, any criminal, civil, administrative or regulatory enforcement action in connection with alleged misconduct, including but not limited to their business affairs.
- Has at minimum of 3 years of professional experience in their field

Public Member Purpose and Qualifications

The BOD's composite should include Public Member who has voting rights. The Public Member should be a consumer or user of services, however, cannot actively hold the credential. The Public Member cannot be an employee of another certification organization related to the profession nor be involved in other organizations which might be considered in conflict with the BOD's Policies and Procedures and/or By-laws.

The Public Member has the same responsibilities and expectations as all board members, but also serves as an additional voice for the general public. The Public Member is expected to share the public's perspective and be the voice for the general public. The Public Member shall serve the best interest of the general public and not acquiesce to the direction of the BOD.

The rationale behind Board including a public member as part of its board member composite is to bring a broader perspective to the decision-making actions of the Board. By doing so, this helps balance the certification's role in protecting the public while still addressing the interests of the certificants. The role of the Board's public member is to represent the public's, consumer's and user's perspective interest to the Board by contributing an unbiased perspective.

A candidate for public member must provide a personal statement ensuring obligation to the activities of the board and as may be assigned, as well as a genuine commitment to acting in the public interest and upholding public confidence by promoting issues of public concern.

Board Elections

Solicitation for nominations to fill vacant or soon-to-be vacant positions on the BOD will be conducted at the beginning of each calendar year as needed. Except for the public member, it is a preference of the BOD hold a credential in a certification governed by the board. The slate of nominees will be presented by the staff liaison and voted upon by the BOD prior to the end of each calendar year.

The process for election of new BOD members will proceed as follows:

A nomination notice will be promoted through email, publications and/or website postings - to re-acquaint the certified credential holders with the nomination and election process.

- Nominations are open to all certification credential holders. Interested individuals are sent copies of documents related to the position. Interested candidates will be required to confirm their interest in writing, provide a CV/resume and provide an optional statement as to how they intend to promote the goals of the BOD.
- The staff liaison will compile the information received from potential candidates and present a slate of nominations for the BOD's consideration.
- The BOD will vote individually on the slate of nominees presented either by mail or email vote. A majority vote is required to elect a new Director to their first term or to elect an expiring Director to their second or third term.
- All election results will be considered final. New, second or third-term Directors elected begin their term January 1st.

If a vacancy on the BOD should occur mid-year or out of the three year term sequence, and the business of the Board is such that a replacement is needed sooner than the regular election procedure affords, the Board shall recruit nominations in a similar way as above and conduct a special election.

Public Member Appointment

The public member will be appointed by the BOD using the following criteria:

- The staff liaison will solicit appropriate public member forums and provide interested candidates with copies of documents related to the position.
- Candidates will be required to confirm their interest in writing, provide a CV/resume and provide an optional statement as to how they, as a public member would promote the goals of the BOD.
- The staff liaison will compile the information received from potential candidates and present a slate of nominations for the BOD's consideration and the BOD will appoint the individual they would determine to be the most qualified.

Board Member Vacancies, Removals and Resignations

Vacancies: An unplanned vacancy on the BOD shall be filled for the balance of the term thereof by a qualified individual presented to the Board by the staff liaison. A majority vote of the BOD is required to elect a new member.

Removals: Any Board Member shall be removed from office with or without cause by a two-thirds vote of the BOD. Removal with cause shall include one or more of the following:

- A consistent pattern of at least three (3) missed meetings and/or lack of timely response to important communications having to do with the certification
- A lack of participation in the BOD's activities
- A loss of the credential as a result of a disciplinary matter
- A violation of the *Code of Ethics* adopted by the BOD
- An apparent conflict of interest regarding activities of the BOD
- A breach in confidentiality or security related to the exam or the BOD

Resignations: Any Director may resign at any time by giving written notice to the Chairman of the BOD.

The resignation shall take effect at the time specified in such notice. In the event of a resignation from the

BOD, a special election will be called to fill the available position based on the BOD Election Procedures noted in these Policies and Procedures.

Meetings

The BOD will meet at least semi-annually. The Board may choose to meet more often as needed to conduct its business. Meetings of the BOD are held by teleconference or at a location determined by the BOD staff liaison.

Members of the BOD may participate in a meeting by teleconference or similar communications equipment by which all persons participating in the meeting can hear one another. Such meetings are deemed official as long as a quorum exists. All actions taken at the meeting conducted by such means are filed as part of the minutes and/or other written records of the BOD proceedings.

BOD Directors are expected to consistently attend scheduled meetings, respond in a timely manner to communications, and fully participate in discussions. The rules of order in the current edition of Robert's Rules of Order governs the conduct of all MCB meetings.

Agenda

The Chair and the staff liaison develop the agenda for the BOD meetings. Any BOD Director wishing to place items on the agenda of any meeting of the BOD shall send such items to the staff liaison for receipt no later than thirty (30) days before the meeting date. The Chair has the authority to accept or reject items proposed for the agenda. Final agenda and subsequent meeting materials are sent to the BOD no later than two (2) weeks prior to the scheduled call/meeting.

Quorum

At all meetings of the BOD, a quorum must consist of the participation of a majority of BOD Directors. One of the Directors participating must either be the Chair or the Vice Chair.

Voting

At any meeting of the BOD, a Director participates and votes only when present in person or by teleconference or similar communication equipment. Each Director (except for the Chair) has one vote. In the event of a tie, the Chair casts the deciding vote. All actions voted on by the BOD require a majority vote. This includes enactment or revision of certification policies, procedures and requirements, removal of a Director from office or the Board, and the establishment of standing committees. Action taken by voice vote during a meeting by teleconference is a valid action of the BOD and shall be reported at the next regular meeting of the MCB.

Standing Committees

The BOD has the authority if necessary, to appoint standing committees to complete the ongoing work of the Board.

Currently, there is one standing committee related to the BOD's certification program – the Certification Committee. Its membership consists of BOD Directors or other NAFTA-certified credential holders and Subject Matter Experts appointed by the Chair to handle development of the exam.

Task Forces

Task forces address specific short-term issues. The BOD Chair will have the authority to appoint and dissolve as needed based on the activities of the Board.

NAFTA Certification Committee

The Certification Committee(CC) is a Certification Committee is responsible for the development of NAFTA's certification exams under the governance of the Board of Directors. The CC currently convenes for activity related to NAFTA's GEI and NAFTA PFT certifications.

The CC is comprised of subject matter experts selected based on related experience level, active years in the profession, industry sector, geographic location and area of expertise. CC members represent all areas of the industry.

NAFTA's Board of Directors makes an effort to achieve a diverse CC composition that all practical and administrative areas of the certification exams are supported. All CC members must have experience as a practitioner in conjunction with other related areas of industry expertise.

CC members are expected to exhibit support for the vision and mission of the association and a true desire to apply their knowledge and skillset for the success of the association, it's members and certificants. CC members are expected to act in a professional, lawful, and ethical manner with the best interests of the association, certification program, and stakeholders of primary concern. CC members are also expected to maintain the confidentiality of the association and certification program, and avoid any personal, professional, or financial affiliations that may be or appear to be conflicts of interest. Certification Committee members must acknowledge with signature of a Confidentiality Agreement and Conflict of Interest Agreement (Exhibit M).

CC members serve voluntarily and may do so until resigning. In the event of a vacancy, candidates may be recruited by other CC members, members of the Board of Directors, NAFTA personnel, and stakeholders. The BOD makes the final selection of those individuals serving on the CB participating in Expert Panels for JTA and Standard Setting.

CC members are responsible for the following:

- Attending and actively participating in certification exam activities.
- Participating in Job Task Analysis activities to identify knowledge, skills and abilities minimally necessary to be awarded the respective NAFTA certification.
- Establishing and defining certification exam content areas and domains to measure proficiency in knowledge, skills and abilities
- Participating in the item development process to create certification exam item content in alignment with defined knowledge, skills, and abilities.
- Participating in exam construction and review activities and support psychometricians in analysis and measurement as necessary.
- Participating in the Standard Setting Study and determination of the cut score(s).
- Participating in the review and revision of exam items tagged with poor performance statistics.

ORGANIZATIONAL CHARTS

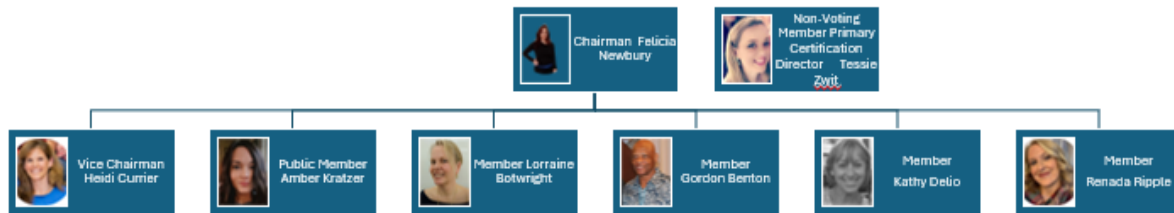
NAFTA ORGANIZATIONAL CHART



Board of Directors Certification Governing Body

 Chair Chelaie Williams	 Vice Chair Roxane Hinton	 Secretary Teresa Torelli	 Certificate Holder Rhonda Nunez	 Primary Certificate Director/Non- Voting Member Tessie Zwiit	 Amber Kratzer	 Rosemary Lindie
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Certification Committee



KEY PERSONNEL

NAFTA Executive Director

Serves as chief staff officer of NAFTA, who shall manage and direct all operational and administrative activities of association, including but not limited to the execution of contracts, employment of staff with the exception of the auditor and legal counsel, management of office operations, development of certification information, liaison to other associations and other activities subject to policies of NAFTA, as they relate to certification. The Corporate Director shall serve without vote as an ex-officio member of the Board of Director Committees, Councils and Task Forces. The Corporate Director shall inform the BOD of any errors or adjustments that may impact the integrity of the association, NAFTA credential, financial health, accreditation status, or stakeholders.

Qualifications for this position include:

- Bachelor's degree or equivalent work experience preferably in Health Administration, Business Administration or related area
- 5+ years' experience managing or administrating a certification or credentialing program
- Experience in all phases of the daily operations of a credentialing program to include programming, marketing, and strategic planning.
- Experience in the hiring, training, management, and evaluation of personnel in the corporate setting and remote staff
- Experience executing and providing oversight of contracts
- Experience in developing, implementing, and monitoring an enterprise wide quality improvement program
- Experience with accrediting agencies standards and measures, and monitoring systems and metrics to assess productivity, timeliness and quality of components to demonstrate outcomes/impact
- Experience communicating with and reporting to varying levels of leadership
- Experience with Document Management Systems and secure record management processes
- High level of integrity and personal accountability

NAFTA Finance Director

The Finance Director is responsible for aligning the financial resources with the mission and vision of the association and identifying concrete ways to engage in increasing financial reserves and cost savings such that NAFTA develops into a sustainable association. The Finance Director is responsible for the oversight and management of the association budget, forecasts and internal financial plans and processes. The Finance Director serves as a key advisor to NAFTA's Executive Director, BOD, and all key stakeholders on all association financial matters. The Finance Director shall inform the BOD of any errors or adjustments that may affect the integrity of the association, NAFTA credential, financial health of the association, accreditation status, or stakeholders.

Qualifications for this position include:

- Bachelor's degree or equivalent work experience in Accounting, Finance, or Financial Management
- Experience in oversight and management of corporate or association budgets, forecasts and internal financial plans and processes
- Demonstrated experience in aligning financial reserves with the mission and vision of the corporation, association, or agency
- Experience establishing annual priorities and benchmarks, creating regular reporting and measuring projections against actual performance
- Experience with financial and IT software systems and integrations to improve system efficiencies and financial accuracy
- Demonstrated growth through identification and implementation of methods to increase financial reserves and cost savings.
- High level of integrity and personal accountability

NAFTA Communications/Education Director

The Communications/Education Director is responsible for internal and external association communications. The Communications Director manages NAFTA's marketing efforts through strategic internal and external communications and is responsible for writing, editing, and strategically distributing communications that advance the mission and goals of the association. The Communications Director shall create and implement a content strategy that leads to measurable action, and develop, solicit, and manage content for multiple channels including social media and industry specific publications.

The Education Director is responsible for the administration, daily operations, and quality assurance associated with NAFTA's education programs within the NAFTA Academy such as continuing education and professional development courses. The Education Director collaborates with the Primary Certification Director to ensure educational support services are current and meet the needs of NAFTA primary certification holders. The Education Director is responsible for the strategic alignment of NAFTA's education programs and NAFTA Academy with the mission and goals of the association. The Education Director is also responsible for the overall direction and sustainability of the NAFTA Academy and reports directly to the Executive Director.

Qualifications for this position include:

- Bachelor's degree or related work experience in Communications, Marketing, or Journalism
- Preferred experience in a nonprofit, certification program, or health and fitness industry
- Demonstrated exceptional writing and editing skills. Must be able to write for multiple audiences and optimize content for different channels of communication.
- Knowledge of current social media trends and experience in social media outreach, ideally on national and local levels, and the ability and confidence to promote the association in a wide range of settings
- Experience working with internal partners to align and support their communications efforts with the mission and goals of the association

NAFTA Education Director

- Bachelor's degree or related work experience in Business Administration, Health Administration, or health related field
- Prior experience with certification programs preferred
- Demonstrated leadership skills
- Experience with resource planning and management and conflict resolution
- Experience training staff members and monitoring compliance
- Experience communicating and coordinating activities across departments to achieve the goals of the association
- Experience in candidate eligibility and ensuring prerequisites are met
- Experience monitoring and reporting performance measures
- Demonstrated adherence to policy, procedures, and requirements, with detail and accuracy
- Excellent written and oral communicator
- Experience in Document Management Systems and secure records management

NAFTA Primary Certification Director

The Primary Certification Director is responsible for the daily administration, operations, and quality assurance to support NAFTA's primary certifications, Group Exercise Instructor (GEI) and Personal Fitness Trainer (PFT). The Primary Certification Director manages the daily activities related to candidate eligibility, registration, information management, and recertifications. The Primary Certification Director is also responsible for oversight of administrative staff and vendor contracts supporting test site administration of the certification exams.

Qualifications for this position include:

- Prior experience with certification programs preferred
- Experience managing teams in the corporate setting as well as remote staff
- Demonstrated leadership skills
- Experience with resource planning and management and conflict resolution
- Experience training staff members and monitoring compliance
- Experience communicating and coordinating activities across departments
- Experience in candidate eligibility and ensuring prerequisites are met
- Experience monitoring and reporting performance measures
- Demonstrated adherence to policy, procedures, and requirements, with detail and accuracy
- Excellent written and oral communicator

- Experience in Document Management Systems and secure record management
- Knowledge of computer programs such as MS Word, Excel, and PowerPoint
- Knowledge of computer programs such as MS Word, Excel, and PowerPoint

NAFTA Administrative Support Staff

Administrative staff will provide phone, email and other forms of contact with NAFTA exam applicants, communication with potential applicants, answering questions and providing information, and data entry related to applicant registration and recertification.

Independent Consultants and Subject Matter Experts

Independent consultants and subject matter experts provide a large, varied pool of highly skilled professionals to meet the needs and expectations of NAFTA association activities, and current and future certificants.

Independent consultants and subject matter experts must have a demonstrated advanced understanding or skill in a specific area. Independent consultants may serve in various capacities and qualifications for these positions will vary according to the area of expertise needed. Subsequently, any NAFTA specific training required for these individuals to serve NAFTA on a specific task falls under the responsibility of NAFTA's manager or supervisor of this position. NAFTA's manager or supervisor conducts any necessary training and the training is specific to the task only and may or may not include association wide training.

All independent consultants and subject matter experts with exposure to confidential candidate personal information and/or NAFTA proprietary information (i.e. certification exam question bank) are required to complete privacy and record management training and sign a confidentiality agreement. Conflict of Interest agreements must be on file for those providing services to NAFTA whereby other positions or roles may be directly competitive or in conflict with NAFTA.

Independent consultants and subject matter experts are expected, by their contributions to the association, to increase the value of the association and not compromise the integrity of the association.

The Executive Director must approve the contracts for all independent consultants and subject matter experts to ensure relevant and varied expertise in the assigned areas.

GRANDFATHERING

NAFTA will only grant a certification to candidates who successfully complete the certification process as required. NAFTA does not recognize, endorse or approve policies of 'grand fathering' for any NAFTA-credential. This 'grand fathering' policy would apply to those pursuing initial certification and recertification of the credential. For initial certification, all individuals must successfully pass the certification exam. For credentialed professionals to remain in good standing with NAFTA, they must submit the required number of continuing education credits (CECs) during the required time period. Each NAFTA credential must be recertified independently. NAFTA does not allow or provide for reciprocal certifications.

AUTONOMY AND IMPARTIALITY POLICY

The BOD shall commit to impartiality in relation to its applicants, candidates and certified persons, and materials related to the development, administration and maintenance of the Certification Program.

Directors shall understand the importance of making decisions related to certification in accordance with

its Policies and Procedures, and shall exercise due diligence in doing so. The BOD shall make public the Policies and Procedures affecting an applicant, candidate and a certified person, and shall fairly and accurately convey information about the certification program to all interested parties and stakeholders. The BOD shall understand threats to impartiality, which include, but are not limited to self-interest, activities from related bodies, relationships of personnel, financial interests, favoritism, conflict of interest, familiarity and intimidation. The BOD periodically reviews a threat analysis to determine the potential, both real and perceived, of individuals or organizations to influence the certification processes or benefit from them.

The BOD Certification Program Policies and Procedures establish clear boundaries for maintaining the certification programs in that there are not shared staff responsibilities in regard to autonomy and impartiality.

Confidentiality Agreements and Conflict of Interest Agreements are signed by all personnel to assure that firewalls are in place and that impartiality exists for those personnel working on certification activities that might be in conflict with other activities within NAFTA. For example, no individual (staff, volunteer, or other) may work on a study guide, practice tests, etc., while at the same time working on exam development, administration or scoring.

COMMUNICATION POLICY

The purpose of NAFTA's communication policy is to establish guidelines for how NAFTA is represented to stakeholders and set expectations for employees and stakeholders for how NAFTA will communicate. NAFTA employs consistent and targeted communications for purposes of engaging, informing, and building trust among NAFTA personnel and professional instructors. External communications are targeted to provide corporate updates, NAFTA happenings and events, member feedback, individual certification status, and member surveys. Due to the international breadth of NAFTA personnel and members, NAFTA external communications are delivered primarily by email and through the NAFTA website.

Internal Communications

Teamwork and the well-being of the individual as well as NAFTA at large are encouraged through open verbal and written communications.

NAFTA personnel are expected to communicate using acceptable language, with political, religious, and social tolerance.

NAFTA personnel may not distribute religious or political mass distribution emails to other NAFTA personnel or vendors using association email.

NAFTA personnel are expected to abide by all security policies and protect the confidentiality of the information they are handling and use information for the sole purpose intended.

NAFTA personnel are expected to protect the privacy of fellow personnel and team members, as well as vendors, and not share personally identifiable information without the explicit permission of the individual.

NAFTA personnel may not share NAFTA proprietary information or engage in association business on

social media unless it is the expressed role of that personnel and/or such exchange has been approved by the Executive Director or BOD. Association information exchanged on social media may not be presented effectively and poorly inform stakeholders and the public. Additionally, disclosure of non-public information and misinformation has the potential to incur financial and legal liability, thus these activities are not permitted.

External Communications

All NAFTA association wide communications must be approved by the Executive Director to ensure accurate messaging with the desired tone.

All communications to outside parties, including vendors, may come only from authorized personnel acting within their described role and responsibilities or at the expressed direction of his/her supervisor.

No non-public information may be communicated unless under the expressed direction of the Executive Director or BOD.

All outside inquiries, such as from media sources, for information about the association, it's Board, stakeholders or vendors, financial status or operations, must be directed to an authorized NAFTA representative. In order to avoid providing inaccurate, incomplete, or proprietary information, only NAFTA personnel with explicit authorization may provide public statements with regard to the association Board, stakeholders, business or operational status.

NAFTA personnel must inform their supervisor in the event non-public or misinformation about the association, Board, stakeholders, or financial or operational status are released.

NAFTA personnel may not make public statements or opinions relating association products and services to other like entities.

Communication Strategy

Stakeholders may expect the following communications:

- Annual
 - Notice of annual Board meeting and solicitation of candidates
 - Annual corporate survey
 - Status report following annual meeting of the BOD
- Quarterly
 - Corporate updates to include any pending change in policy(s)
 - Calendar of NAFTA happenings and events
 - Survey link for previous quarter happenings or events
- Monthly
 - Individual notifications regarding certification status
 - Happenings and events change if necessary
 - Corporate personnel change if necessary
- Weekly - Public social media accounts are updated to provide current information and awareness of NAFTA happenings and events (National Aerobics and Fitness Trainers Association Facebook page, Twitter, Instagram)

Any violation of this policy may result in immediate termination of employment, loss of certification status and potential for future certification, removal from NAFTA professional database, and legal action against the individual offender.

NONDISCRIMINATION POLICY

NAFTA does not discriminate among candidates on the basis of race, color, creed, gender, age, religion, national origin, ancestry, disability, military discharge status, sexual orientation, or marital status. NAFTA strives to adhere to all federal, state, and local regulations pertaining to non-discriminatory practices.

NAFTA complies with the Americans with Disabilities Act (ADA) and strives to ensure that no individual with a qualified disability is deprived of the opportunity to take NAFTA examinations solely by reason of that disability. NAFTA will provide reasonable accommodations for candidates with disabilities.

PROCEDURES FOR REASONABLE ACCOMMODATION REQUEST

NAFTA does not discriminate for the purposes of Board membership or office, application, examination, continuing education, recertification or any other activity of NAFTA on the basis of age, sex, sexual preference, color, religion, creed, marital status, national origin, race, language, medical condition or disability.

All candidates and board members are considered solely on the basis of their skill, knowledge as practitioners and their ability to safely treat the consumer. NAFTA complies with all applicable federal and state laws (ADA) with respect to certification and recertification responsibilities. NAFTA assures that vendors for examination facilities and services adhere to nondiscrimination policies and that the facilities are ADA accessible.

NAFTA does not discriminate on the basis of disability. This includes disability involving the special senses, mobility, brain injury, language impairment, or developmental or acquired disability as long as the minimum requirements for candidacy have been met.

Upon request and submission of necessary documentation, NAFTA shall make all reasonable accommodations to assist candidates with qualified disabilities or language barriers in taking the examination or participating in other NAFTA activities. Examples of these accommodations include a sign language translator for a candidate who is hearing impaired, an assistant/reader or adaptive equipment for a candidate who is visually impaired, a personal assistant for a candidate who is mobility impaired. A reader will be provided for any candidate with documented visual impairments.

All examination facilities meet ADA standards and are accessible by those in wheelchairs or with other mobility impairments. Special arrangements can be made for candidates with disabilities by submitting a letter requesting special arrangements with the completed application. A current letter from a health care specialist knowledgeable of the candidate's disability stating the specific needs of the candidate must accompany the completed application and letter of request. Pursuant to the ADA, accommodations will be provided to qualified candidates with disabilities to the extent that such accommodation does not fundamentally alter the examination or cause an undue burden to the agency.

Additionally, any adaptive equipment for overcoming obstacles imposed by a disability that the candidate must use in his/her office in order to practice will be permitted for purpose of the examination. Any special accommodations must be requested at the time of application. All candidates requiring special accommodations are required to notify NAFTA of these specific requirements in the appropriate section on the application. The cost of excessive accommodation requirements is to be borne by the candidate (i.e.,

electronic communication equipment, etc.).

Examples of requests for special testing accommodations that may be granted include modification of seating or other physical arrangements in the examination facility or providing for the examination to be taken in an accessible location, providing for a reasonable extension of testing time, providing an interpreter, reader or other auxiliary aid.

Examples of requests for special testing accommodations that may be denied include modification of the content of an examination, providing for unlimited testing time, permitting a reader to paraphrase test material. NAFTA Examinations are in English and NAFTA does not translate its examination into Foreign Languages, nor does it provide or allow Interpreters to translate the examination. All candidates requiring special accommodations are required to notify NAFTA of these specific requirements in the appropriate section on the application.

THE CERTIFICATION EXAM

Job Analysis/Role Delineation:

The Job Analysis Study defines the current knowledge, skill and abilities that must be demonstrated by entry-level credential holders to safely and successfully practice. The knowledge statements (KS)'s are validated according to their frequency and insistent necessity. This study also serves as a blueprint for determining the content for the certification exam(s).

NAFTA conducted a practice analysis utilizing highly qualified subject matter experts to determine the necessary knowledge that an entry level health/fitness professional should possess.

NAFTA upholds stringent guidelines for the construction, implementation and delivery of the certification testing process.

The following steps must be completed at a minimum of 5-year intervals:

1. Validation Study:
 - a. A research survey is conducted to determine the validity of the job analysis. The survey is sent to a large, national random sample of fitness professionals for validation.
2. Item Writing:
 - a. Draft exam items are initially generated using AI tools based on the established content outline. These items are then reviewed, validated, and revised by a national, representative panel of Subject Matter Experts (SMEs).
3. Exam Construction:
 - a. The SME panel reviews and approves the final items before submission to an independent Psychometrician for editing.
4. Cut Score Determination:
 - a. The passing score is to be determined as a standard for public protection. Each question must be rated by a group of industry experts using criterion-referenced procedures. The experts estimate the percentage of minimally competent professionals that will answer each question correctly. The passing score is then calculated and based on the overall degree of difficulty.
5. Continual Exam Evaluation:
 - a. Following an exam administration, there is a continual evaluation and analysis of each

question to help ensure validity. If a question is determined to be flawed, it is reworked or replaced. A new exam development process begins every five years. NAFTA exams are developed using the six-point exam development process and are guided by standards accepted by the American Psychological Association, the American Educational Research Association and the National Council on Measurement in Education.

Certified Group Exercise Instructor Exam Content

Candidates are encouraged to review the following exam content outline and prepare accordingly:

Domain I. Professional Responsibilities	17
A. Scope of Practice	4
1. Adhere to professional standards, guidelines, or evidence-based research in order to provide safe and effective instruction.	
2. Recommend consultation with healthcare professional for concerns that fall outside of scope of practice.	
B. Legal Liability	5
1. Obtain liability insurance in order to minimize personal risk.	
2. Adhere to music copyright laws in order to minimize personal risk.	
3. Obtain signed pre-participation waivers and consent forms in order to minimize personal risk.	
4. Adhere to branding rules in order to mitigate personal risk.	
5. Maintain current cardiopulmonary resuscitation (CPR) and automated external defibrillator (AED) certifications in order to minimize risk.	
C. Conduct	5
1. Dress in appropriate attire for class format in order to provide a safe and welcoming environment.	
2. Greet participants in order to build rapport.	
3. Introduce self and class format at the beginning of class in order to set participant expectations.	
4. Arrive early in order to ensure preparation of environment and prompt start.	
5. Use inclusive language in order to provide a non-discriminatory environment	
D. Business Principles	3
1. Adhere to contract policies and procedures related to employment in order to maintain employment in good standing.	
2. Acquire continuing education credits in order to stay current with industry trends or standards.	
3. Respond to participant feedback in order to enhance participant satisfaction.	
Domain II. Class Design and Planning	28
A. Environment	8
1. Inspect equipment in order to identify potential hazards and minimize risk.	
2. Assess class environment, such as temperature and potential hazards, in order to minimize risk.	
3. Determine maximum number of participants in order to provide a safe and effective workout.	

4. Select appropriate equipment and movement patterns for participant abilities, class size, and format in order to provide a safe and effective workout.

B. Format 20

1. Select and sequence exercises in order to provide a safe and effective workout.
2. Prepare modifications (i.e., progression/regression movements) for a variety of fitness levels and backgrounds in order to provide safe and effective instruction.
3. Select appropriate movement intensity and duration for class format and participant demographics in order to provide a safe and effective workout.
4. Design appropriate warm-up and cool-down activities in order to provide safe preparation and recovery for participants.
5. Select appropriate music style, tempo, and volume for class format in order to provide a safe and motivational environment.
6. Incorporate destabilization movements in order to enhance balance and stability.

Domain III. Class Delivery 35

A. Instruction/Coaching 32

1. Provide nonverbal/visual cues in order to provide effective leadership.
2. Provide verbal cues in order to provide effective leadership.
3. Demonstrate proper exercise form and alignment in order to provide safe and effective instruction.
4. Observe participant form and provide feedback in order to ensure proper technique and injury prevention.
5. Monitor participant performance for signs of distress in order to minimize risk.
6. Present alternative movements (modifications) in order to provide a safe and effective workout for all participant ability levels.
7. Instruct participants to monitor level of exertion in order to minimize risk and enhance workout.

B. Motivation 3

1. Provide positive reinforcement in order to enhance participant experience.
2. Coach participants in order to encourage them to put forth their best efforts.

Domain IV. Principles of Anatomy and Physiology 20

1. Demonstrate and explain functional activities of daily living (ADL) in order to provide muscle balance.
2. Select and sequence strength and conditioning exercises in order to provide a safe and effective workout.
3. Demonstrate and cue proper range of motion in order to prevent participant injury.
4. Demonstrate and cue proper joint action and lever length in order to prevent participant injury.
5. Use anatomical terms to refer to muscle groups in order to educate participants and provide clear instruction.

Exam Retirement

- An exam form is retired after 1,000 administrations, or after 24 months, whichever comes first.
- Items on a retired exam may become eligible for re-entry into the item bank as long as they have not been used as sample items or items that have appeared on practice exams.
- Retired exams can become eligible as practice exams.
- Items on practice exams are not eligible for re-entry into the item bank.

Exam Specifications

Upon completion and approval of the Job Task Analysis, a report detailing the content of the proposed exam specifications, including the relative emphasis was placed upon each content area and the total test length was determined. The final exam content outline is generated and made available to the public based on the BOD's approval of the Job Task Analysis (see previous section titled, "Certified Group Exercise Instructor Exam Content").

The exam consists of 110 multiple choice items. One-hundred of those items are "scored" (graded), and 10 are considered "pretest" (appearing on the exam but not being scored). The pretest items are inserted into the exam randomly. The responses from these items help determine their validity as to whether they should to be used in the future as scored items.

There is a three (3) hour time limit for the exam unless special accommodations are granted.

Quality Control Procedures

1. **Exam performance.**
Each exam form is statistically analyzed annually by sound, proven, accepted psychometric methods. Decisions based upon performance are determined upon consulting with a psychometric consultant. Results of the statistical analysis are published in the annual report of NAFTA.
2. **Item performance.**
Each item is statistically analyzed annually to determine the number of candidates selecting the key, and prevalence of each distracter. Items performing poorly are reviewed, and either modified, retired or left unchanged.
3. **Exam delivery.**
Testing centers and independent proctors are monitored for compliance to our procedures by recording and reporting the activities at each testing center for each exam administration.

Exam Security Procedures

It is imperative that the specific nature of any item written for examination be kept in strictest confidence. Disclosure of any information about the examination items to anyone outside of NAFTA staff constitutes a breach of security and may compromise or invalidate the entire testing and certification process. All participants in the program are required to sign a Compliance Statement, agreeing to abide by the security procedures established to protect the examination from compromise.

Exam Item Security

- Item bank is kept in secure computer-based database with Fasttest. NAFTA's Primary Certification Chairman will have secure clearance to access the item bank.

- Item reviewers must sign a non-disclosure statement (see Exhibit A) attesting to the fact that they are not to transmit, divulge or otherwise communicate the content of any exam items they may have worked with or seen in the processes, including but not limited to, item writing, exam construction and review, cut score study or any other time items are reviewed.
- Store all items in a password protected data file, which are only accessible to NAFTA's Primary Certification Director and the independent psychometric analysis consultant.
- Destroy (shred or burn) any written drafts or copies of items, or notes relating to item development and as in accordance with Record Management policies.
- Never keep hard copies of written items. When attending workshops NEVER remove items, answer keys or any portion of an examination from the workshop room. Ensure the security of test materials at all times.
- For test development work performed via internet access, maintain technological security at all times. Keep password information in a secure location. Never leave computers unattended if performing test-development work (online or otherwise) is in a public space.
- Never ask anyone outside of NAFTA or NAFTA's staff to review or discuss items.

Exam Delivery Security

NAFTA's certification exams are delivered via Live Remote Proctoring, computer-based proctored exam, and by an independent proctor or through a third-party contracted partner (Assessment Systems).

Exam Delivery – Live Remote Proctoring

National Commission for Certifying Agencies (NCCA) has determined that it is possible to meet the NCCA's Standards for the Accreditation of Certification Programs when using live remote online proctoring. As such, NAFTA's NCCA-accredited Group Exercise Instructor Exam is now open for scheduling with ProctorU. If you have already registered for an exam, then within one business day of your registration an invitation email was delivered to you from noreply@proctoru.com with the subject line "Schedule Your NAFTA Certification Exam." That email includes a unique URL to activate an account with ProctorU and to schedule your NAFTA certification exam. Please check your inbox (and junk/spam folder) for this important email. If you have questions, please contact NAFTA's Director of Certification at 1-480-758-5119 or cwilliams@naftafitness.org

Completing your exam certifications is as easy as 1-2-3.

Step 1

Register for the certification Exam

- Visit the [ProctorU Resource Center](#) to view the system requirements* and to test your computer equipment to ensure compatibility for remote online proctoring.
- Next, click on the appropriate 'add to cart' box below to begin online registration, or call NAFTA's office at [1-480-758-5119](tel:1-480-758-5119) to register over the phone.
- Once registered, you will receive a confirmation email including your receipt.

Step 2

Schedule your exam with ProctorU

- Within 24-48 hours, NAFTA will upload your information to ProctorU, at which time you will receive an automated email from ProctorU including instructions to set up your ProctorU account and to schedule your exam.
- Your exam must be scheduled within one year of the registration date.

- Remember to study prior to your exam!! NAFTA highly recommends that candidates devote an appropriate amount of time (e.g., at least 30-45 days) and effort to self-directed study prior to attempting the certification examination.

Step Three

Complete your exam

- Visit the [ProctorU Resource Center](#) to learn what to expect before and during your exam.
- Please view the short video titled,
[Candidate Experience: Certification and Professional Testing Organizations](#).
- It is also very important that you [test your computer equipment](#) prior to the exam date to ensure your
- computer is configured to support remote online proctoring.
- NOTE: Google Chromebooks, iPads, and Android tablets are not supported for live remote proctoring.
- You must use a compatible Internet browser including either Google Chrome (preferred) or Mozilla Firefox.
- Prior to the exam, set-up your exam space in a private, well-lit area, free of noise and distractions
- Please refer to NAFTA's Exam Candidate Handbook for important information, policies, and procedures regarding NAFTA's NCCA-accredited Group Exercise Instructor certification exam.
- Login to your ProctorU account at least 5 minutes before the scheduled start time.
- When it's time to begin, your identify will be verified, the physical and virtual environments secured, and then you will compete your exam.
- You should expect the start-up process with the proctor to take about 10-15 minutes; however, this will not affect your exam time.
- You will receive your exam results via email within 30 days of your exam date.

*IMPORTANT, PLEASE READ:

- In order to use ProctorU, you will need a high-speed internet connection, a webcam (internal or external), a Windows or Apple (Mac) operating system, and a government-issued photo ID.
- NAFTA recommends that you visit <https://test-it-out.proctoru.com/> prior registering for an exam to test your computer equipment. We recommend you click on the button that says "connect to a live person" to fully test your equipment. Please make sure that you are using the current version of your Internet browser (Google Chrome or Mozilla Firefox) and have downloaded the ProctorU extension available at <http://bit.ly/proctoruchrome> or <https://www.proctoru.com/firefox>.

ProctorU ARTICLES OF INTEREST

- [Important Notice – MacOS X Catalina And Big Sur Users](#)
- [Exam Day: What to Expect](#)
- [Internet Connection and Bandwidth for Your Exam](#)

Exam Delivery – Computer-Based Testing Site

Exams and registration rosters are delivered via a secure (password protected) internet site to a third-party computer-based testing site. The exam site administrator must administer the exam according to the procedures outlined in the Proctor Manual (Exhibit L).

Upon completion of the examination, the exam site administrator sends the exam results for each candidate

via a secure (password protected) internet site.

Candidate Check-In:

Candidate must bring the following to the exam location:

1. Valid government issued photo identification
2. NAFTA Exam registration voucher

Admission

1. The exam site administrator will permit only the person identified on the registration roster to sit for the exam.
2. Candidates must present a valid government issued photo identification at check in.
3. The name on the photo id must exactly match the name on NAFTA's registration voucher and the registration roster.
 - a. Exceptions to this may be made on a case-by-case basis if the candidate is able to provide sufficient supporting documentation regarding any differences between the name on the registration roster and the name on the photo ID. For example, a maiden name on a photo ID and married name on the registration voucher and roster may be reconciled with a copy of a marriage license.
 - b. It is the responsibility of the candidate to provide adequate supporting documentation. The candidate is responsible for contacting NAFTA at least 5 business days prior to the exam date to discuss discrepancies and receive guidance. A candidate who is unable to provide sufficient supporting documentation will not be permitted to take the exam at the scheduled time. The candidate may reschedule or cancel the exam date. Reschedule and refund policies may apply.

Policies for the Exam Process:(Exam Conduct)

- No visitors are allowed in the examination areas.
- Candidates may not bring the following items into the exam area:
 - Coats
 - Books
 - Electronic devices (PDAs, Blackberries)
 - Cell phones
 - Pagers
 - Luggage
 - Book bags
 - Any personal items to the examination area
- Should the candidate inform the administrator that he/she does not wish to continue taking the exam, that candidate will not be able to complete the exam for the remainder of the day.
- Disruptive behavior is cause for immediate dismissal by the exam site administrator.

Exam Delivery – Traditional Setting with Independent Proctor

- All NAFTA exam administration site proctors are required to complete training as directed by the Primary Certification Director and acknowledge by signature full understanding of the procedures and instructions in the Proctor Manual (Exhibit N) prior to serving in the role of exam administration site proctor.

- Exams are delivered, by an authorized NAFTA proctor to the exam administration site. proctor via a sealed envelope. The proctor must administer the exam according to the procedures outlined in the Proctor Manual.
- The Primary Certification Director provides training and verifies all Proctors are trained and meet the requirements as outlined.
- Upon completion of the examination administration the proctor shall return the registration rosters, exams and answer sheets to the authorized NAFTA representative, in the envelope provided in the first sealed envelope, sealed and initialed by the proctor across the seal.

Testing Center Requirements

Building, Grounds, Test Room

- Testing Center must conform to local building, sanitation, and health codes.
- Building and grounds must be clean and in good condition.
- The exits must be clearly marked and unobstructed.
- Fire extinguishers, when required, must be in working order, the location well marked, and easily accessible.
- Emergency exits must be clearly identified and clear of obstructions.
- Emergency first-aid kits, if required, must be stocked and easily accessible.
- Restrooms must be clean, supplied with towels, etc., and in working order.
- Restrooms must be located in the same building as the testing center.
- Adequate parking must be available, near the testing center location.
- Temperature must be consistent and comfortable.
- Testing room must be well-ventilated, with continuous air circulation.
- Testing room must be lit so that the candidate at each terminal can read all diagrams, charts, etc., and read the computer screen without difficulty.
- Testing room must be large enough to comfortably place the testing station(s).
- Generally speaking, 120 square feet or larger is adequate.
- Each testing station must be separated with a suitable partition or spaced a minimum of five feet apart.
- There must be enough table space for the necessary equipment (i.e.: computer monitor, keyboard, and mouse pad) and testing materials the candidate will be issued.
- Testing area should be located so candidates will not be disturbed by foot traffic, loud conversation or outside noise.
- Testing rooms shall be free from any other activity during testing sessions; during non-testing times, the testing room may be available for other uses.
- In general, the testing center should provide a pleasant and comfortable atmosphere and be conducive to a good testing environment.

Security and Supervision

- Testing must take place in a separate room with a closeable door.
- Testing room must have a window, video surveillance system, or seating for an in-room proctor for test supervision. All must allow an unobstructed view of each candidate within the testing room.
- Testing room door must be lockable. Access to this room must be strictly monitored. Only

authorized personnel are permitted.

- All testing materials must be secured when not in use. A locking file cabinet may be used for this purpose.
- The testing room may be used for other purposes when not being used for testing.

Equipment and Supplies

- Copy machine or scanner to provide copies of candidate IDs and test eligibility to be returned to the NAFTA office along with exam answer sheets.
- Scratch paper for the candidates. (Two sheets to each candidate)
- Supply of #2 pencils. (Two are issued to each candidate)
- Testing center procedures manual. (Supplied by NAFTA)
- Test centers are quality control checked at least twice a year.
- NAFTA additionally conducts background checks on proctors/exam site administrators and ensures they are trained and training updated a minimum of twice a year.

CANDIDATE ELIGIBILITY REQUIREMENT

A candidate must meet all eligibility requirements that have been established as detailed in the table below. A candidate may expect these eligibility requirements to meet industry standards for the designation of Group Exercise Instructor. NAFTA's eligibility requirements ensure compliance with labor laws, that candidates meet a standard level of academic preparedness, and candidates have basic emergency response training. In addition, these fundamental requirements protect the safety and well-being of the public served, improve customer satisfaction, and reduce risk. Additionally, candidates are not required to be a member of the NAFTA nor the Academy in order to be eligible to sit for the exam.

Eligibility Requirements - NAFTA Group Exercise Instructor Exam

- Must be at least 18 years of age
- Must have at minimum a high school diploma (or the equivalent)
- Must hold a current adult CPR (cardiopulmonary resuscitation) and AED (automated external defibrillator) certificate*

**CPR and AED are both required in the US and Canada. Candidates outside the US and Canada are required to hold only current CPR due to differing laws regarding AED use by non-medical professionals in some countries. Candidates taking an NAFTA exam via Computer-based Testing must hold a current CPR/AED certificate prior to registration.*

**** All NCCA-accredited certification programs can be found via the following link: <http://www.credentialingexcellence.org>**

Table 1 Eligibility requirements for NAFTA Group Exercise Instructor Exam

Eligibility documentation information and forms for NAFTA certification exams can be obtained at <https://www.NAFTAFITNESS.org/myNAFTA/Exam-Pre-Approval.pdf> or by contacting NAFTA's Exam Registration Department via phone at (480)758-5119, or via email at ExamRegistration@NAFTAFITNESS.org.

EXAM APPLICATION

Prospective candidates who meet the eligibility criteria as noted above can register for the certification exam by submitting the following documents:

- Completed registration online via naftafitness.org
- A copy of a current CPR/AED certification (front and back)
- Submit payment via check, money order or credit card information (VISA, MasterCard or Discover)

Submit documents via:

1. Website www.naftafitness.org Copies of CPR, verification of education, and Candidate Compliance Statement must also be emailed or faxed
2. Email to registration@naftfitness.org
3. Mail by USPS (certified or registered mail is recommended)

NAFTA
16495 N 113th Way
Scottsdale, AZ 85255

Reasonable Accommodation and Special Arrangements for Candidates with Disabilities

NAFTA complies with the Americans with Disabilities Act (ADA). We strive to ensure that no individual with a qualified disability is deprived of the opportunity to take our examination solely by reason of that disability. NAFTA will provide reasonable accommodations for candidates with qualified disabilities.

Candidates requesting accommodations must complete a Candidate Request for Reasonable Accommodations Form (Exhibit B) (<https://www.naftafitness.org/resources/reasonableaccommodations.pdf>), submit a completed NAFTA Health Care Provider Certification Form (Exhibit C) (<https://www.naftafitness.org/resources/healthcareprovider.pdf>), and completed and signed HIPAA Consent Form (Exhibit D) (<https://www.naftafitness.org/resources/hippa.pdf>).

Any additional support documentation must appear on the licensed professional's official letterhead and include all of the following:

- The licensed professional's title, address, and telephone number
- A description of the nature of the functional limitation as it applies to taking an online or traditional paper and pencil multiple-choice standardized test
- The specific accommodations the candidate will need for testing to include rationale

The authority providing this letter may also include test results or other official documentation

that identifies the candidate's disability and the accommodation(s) required.

All documentation must be submitted together. If any documentation is missing or incomplete, the completed package must be submitted within 45 days of test date or the reasonable accommodations review process will expire. Late submittals may impact NAFTA's ability to provide the requested reasonable accommodation for the registered test date and an alternative test date may have to be scheduled.

All forms must be complete and submitted via mail or email to:

NAFTA
16495 N 113th Way
Scottsdale, AZ 85255
registration@naftafitness.org

CONFIDENTIALITY

Solicitation of questions from candidates who have previously taken the examination is considered unethical by the Board for the following reasons:

- Candidates are expected to pass the exams on their own merit. The members of the public entrust NAFTA's credential with their health and well-being. This trust includes the expectation that the certified individual is a trustworthy and competent individual.
- The purpose of NAFTA's exam is to decrease risk to the general public by ensuring that candidates for certification have attained entry-level competence. By pursuing previous exam takers to share exam questions, the very purpose of the exam is undermined.
- Candidates pursuing previous test takers for exam information would be encouraging candidates to commit illegal acts. Previous exam candidates have accepted the confidentiality agreements and are contractually obligated to uphold those agreements. If the confidentiality agreement is violated, the exam candidates can and will be prosecuted by NAFTA.
- Published exams are the copyrighted property of NAFTA.
- Statements of confidentiality are manually approved by each candidate prior to, and upon completion of the exam, as a natural process during the examination process.

SECURITY

Violations to Confidentiality

It is illegal and unethical to recall (memorize) and share questions that are on any NAFTA certification exam. At exam day registration, exam candidates are required to agree to a confidentiality statement attesting to their intent to keep the contents of the exam confidential. As such, candidates may not solicit questions or discuss items that were on previous exams with other NAFTA certification examination candidates or individuals who currently (or previously) hold the certification. Recalling and sharing questions from the exam with anyone else violates the confidentiality agreement and Federal Copyright Laws. NAFTA will prosecute violations of this agreement. Violation of this security agreement is also a violation of NAFTA Standards of Professional Practice which may result in suspension or revocation of NAFTA's credential from those who have earned it, and suspension or denial of eligibility for future exams for candidates found to have violated their confidentiality agreement.

Score Reporting Security Procedures

All exams are analyzed and scored by Assessment Systems (See Score Reporting form - Exhibit D). For

those individuals taking the computerized exam, scoring will be computed immediately upon completing of the exam. For those individuals taking the exam in the traditional setting (paper and pencil), NAFTA will inform candidates of the official results of their examination within 30-45 days of the examination date. For those individuals opting the traditional setting, all official examination results and scores will be emailed to candidates and/or via USPS,

All examination results are confidential and will only be released to the candidate. Permission must be received in writing from a candidate to release examination results to any third party. NAFTA will only confirm whether an individual is currently certified, in response to inquiries from the public and other interested stakeholders

Score Reporting and Verification of Certification

Each item on the certification exam has only one best answer and is scored as either correct or incorrect. There is no penalty for guessing or any additional penalty for wrong answers. Each scored item that is answered correctly earns one raw score point. The total raw score is the number of scored items answered correctly on the entire exam. The passing cut score is the raw score of 70 correctly answered scored items out of 100 scored items appearing on the exam. The determination of the passing score was based on a Cut Score Study conducted by Subject Matter Experts (SMEs) in the field using a Modified Anghoff procedure. The underlying philosophy of the Modified Angoff procedure is that the standard set should be related to item difficulty, specifically the difficulty of the items relative to what is expected of the examinees. The cut score computed has been validated statistically and reflects the minimum level of knowledge required for proficiency by NAFTA group exercise instructors.

The GEI score report provides the candidate with the pass/fail results of his/her exam based on the passing standard previously established. Those candidates who pass the exam are awarded the credential and can begin using its designation immediately. Those candidates who fail the exam are provided with descriptive information as to how he/she performed in each of the major content areas. Appropriate cautions about the unreliability of domain level (subscore) scores are also provided in the failed score report to prevent misinterpretation/misuse of the data. Failed candidates are encouraged to refer to the Content Outline in the GEI Candidate Handbook to help measure their performance on specific areas of the exam.

For all computer-based GEI exams, the exam is scored by the computer immediately after the candidate completes his/her administration. Candidates get their results immediately upon completion of their test administration.

In the traditional setting, within 24 hours of the conclusion of the exam administration, the Proctor will return the test booklets, answer sheets, seating chart (if applicable), and Test Site Report/Incident Reporting Form (if applicable) to an authorized NAFTA representative via Federal Express, using the return envelope/box provided. Upon receipt, NAFTA uploads completed exams (scantron) to the appropriate Assessment Systems (AS) software for scoring. Candidates can expect their score report within 45 days from the date of their exam administration.

RELEASE OF INFORMATION

No examination results information will be provided by telephone or fax.

All examination results are confidential and will be released to the candidates only. Permission must be received in writing from a candidate to release examination results to any third party.

NAFTA will, however, confirm whether an individual is currently certified, in response to inquiries from the public and other interested stakeholders.

Access to individual records is restricted to the applicant, candidate, certificant or authorized personnel. The receipt and use of NAFTA test information and materials is limited strictly to authorized NAFTA Board Directors, employees, agents, volunteers, contractors, and representatives. All persons identified in this policy must agree to abide by and comply with this policy and all policy requirements in writing. Each NAFTA board Director, employee, agent, volunteer, contractor, and representative may be subject to discipline or other sanction by NAFTA due to a violation or attempted breach of any portion of this Policy. NAFTA reserves the right to enforce this policy by any and all appropriate and legal means.

In the event there is a request to release information related to court order or legal process, NAFTA would seek legal counsel for assistance asking for further clarification. Pending legal advice, NAFTA would use Court Order-A HIPAA-covered procedures. A HIPAA- covered health care provider or health plan may share protected health information if it has a court order. This includes the order of an administrative tribunal.

However, the provider or plan may only disclose the information specifically described in the order. Subpoena A subpoena issued by someone other than a judge such as a court clerk or an attorney in a case, is different from a court order. A HIPAA-covered provider or plan may disclose information to a party issuing a subpoena only if the notification requirements of the Privacy Rule are met. Before responding to the subpoena, the provider or plan should receive evidence that there were reasonable efforts to: Notify the person who is the subject of the information about the request, so the person has a chance to object to the disclosure and seek a qualified protective order for the information from the court.

RETEST POLICY

Candidates who do not pass a certification examination are eligible to retest for the retest fee of \$179.00. NAFTA allows candidates to retest after 30 days of the initial exam date. This provides adequate time for review of the subject matter areas.

If a candidate does not pass after a 2nd attempt, the candidate may retest after 30 days from the second test date. This allows time for the candidate to prepare more in depth for the exam and be made aware of any policy and/or exam changes. If a candidate does not pass the exam after three (3) attempts, the candidate will have a 1 year waiting period before further attempts may be made. This allows time for the candidate better prepare through longer range practical experience or coursework that might be applicable to the profession.

APPEALS POLICY

Eligibility

NAFTA reserves the right to reject any registration application that does not meet the specified eligibility requirements. If a registration application for the certification exam is not accepted, an individual can

appeal and request the application be reviewed again. The appeal must include a detailed explanation of the reason(s) why the individual believes they should be eligible, plus all supporting documentation. The Appeals form can be found in Exhibit J of this document. Eligibility appeals will be reviewed and responded to within 10 working days of their receipt. Individuals submitting the appeal will receive notice that their eligibility appeal was either “approved” with instructions for moving forward with exam registration, or “denied” with notification of the reason for the denial. Individuals who have an eligibility appeal “denied” can submit a new eligibility appeal if they have additional supporting documentation that meets the requirements noted in the denial.

Test Environment

Candidates who believe their exam results were negatively affected by improper test administration or conditions may appeal. While it is not required that a candidate alert the proctor to such factors, doing so is recommended so that the proctor may implement corrective measures when possible and inform NAFTA of the incident. Immediate documentation from the candidate will be beneficial in the event of an appeal. Appeals must be submitted within fifteen (15) days of receipt of test score.

NAFTA will review information and provide notice of the final determination to the candidate within 45 days of the receipt of the appeal. All determinations will be final. The candidate may retest the exam within 30 days of the date mark on the appeal decision.

Adverse Certification Decisions

The following Adverse Certification Decisions by the National Aerobics & Fitness Trainers Association (the “NAFTA”) are subject to review and appeal:

A. Adverse Administrative Decisions:

- Denial of a request for extension of an established deadline or for exception to other administrative requirements.
- Denial of a grievance regarding examination administration.

B. Adverse Substantive Decisions:

- Denial of eligibility, certification or recertification for non-disciplinary reasons.
- Revocation of eligibility, certification or recertification for non-disciplinary reasons.

C. Reportable Disciplinary Actions:

- Irregular behavior before, during or after a NAFTA examination.
- Manufacture or use of fraudulent NAFTA credentials.
- Legal, regulatory or credentialing action.

NO APPEAL may be taken from an Adverse Certification Decision based on an individual’s receipt of a failing score on an NAFTA examination.

CONFLICT OF INTEREST POLICY

NAFTA Directors shall not participate in discussions of, or vote on, any review or appeal in which the Director has or has had a substantial personal or professional relationship with the individual at issue.

NOTICE OF ADVERSE DECISION

An individual who has received an Adverse Decision that is subject to review and appeal (the “Respondent”) shall be sent a prompt written Notice of Adverse Decision. The Notice shall state the reason(s) for the Adverse Decision and shall inform the Respondent that he or she has the right to seek review of the Adverse Decision by filing a written Request for Review with the NAFTA, and that the Request for Review must be received by the NAFTA with thirty (30) calendar days after the date of the Notice of Adverse Decision. The Notice shall include a copy of this NAFTA Review and Appeal Process for Adverse Certification Decisions.

THE REVIEW PROCESS

A. Composition and Role of the NAFTA Review Panel: The NAFTA Review Panel shall be appointed on an annual basis and shall consist of three (3) current or former NAFTA Directors. One member of the Review Panel shall be a current member of the Credentials Committee, and no member of the Review Panel shall be a member of the Executive Committee. The Review Panel shall consider the Notice of Adverse Decision and the Request for Review, including any supporting documentation submitted by the Respondent or prepared by NAFTA staff. The Review Panel also may, at its discretion, request or receive, and review, additional information. The foregoing shall constitute the Review Record. A copy of the Review Record shall be forwarded to the Respondent at least 14 calendar days before the meeting of the Review Panel. The review shall be conducted pursuant to the procedures set forth in Section IV.D. (for administrative decisions) or Section IV.E. (for substantive and disciplinary decisions).

B. Request for Review : The Request for Review must contain a statement of why the Respondent believes that the Adverse Decision was improper, must include any supporting documentation that the Respondent wishes to have considered as part of the review, and must be accompanied by a Review Fee in the form of a check for \$50.00 made payable to the NAFTA. If the Respondent requests a hearing before the Review Panel, as described more fully in Section II.C, the Respondent’s intent to appear personally before the Review Panel or to address the Review Panel by telephone must be expressed in the Request for Review. If a Request for Review is not postmarked within 30 calendar days, the Adverse Decision shall constitute the final decision of the NAFTA on the matter and shall not be subject to appeal absent extraordinary circumstances, as determined solely by the NAFTA.

C. Telephonic Hearings: A Respondent requesting review of an Adverse Decision may submit a timely request for a hearing before the Review Panel by telephone. Not less than 30 calendar days prior to the scheduled date of the hearing, the NAFTA shall notify the Respondent in writing of the date and time of the hearing.

If the Respondent will be accompanied by legal counsel, NAFTA must be so notified in writing no less than 7 calendar days prior to the date of the hearing.

A Respondent who chooses to appear before the Review Panel by telephone shall be given the opportunity to make a statement summarizing his or her position. The Respondent’s legal counsel may make an opening or closing statement. At the conclusion of the Respondent’s presentation, members of the Review Panel and NAFTA legal counsel may ask the Respondent to respond to questions. The Review Panel shall not be bound by technical rules of evidence usually employed in legal proceedings, but may consider any evidence it deems appropriate.

All expenses incurred by the individual in connection with the hearing shall be borne by the Respondent. If the Respondent requests a hearing and, without good cause, fails to appear or fails to advise the NAFTA in writing more than 7 calendar days before the scheduled date of the hearing that he or she will not appear at

the hearing, the Respondent may forfeit his or her opportunity for a hearing, and the Review Panel may proceed with its deliberations in the matter.

Following the hearing, the Review Panel shall determine, by majority vote of those members present, whether to ratify, reverse, or modify the Adverse Decision. The Respondent shall be notified in writing of the decision, including the reasons therefor, within thirty (30) calendar days after the Review Panel reaches its decision.

D. Final Review of Administrative Decisions: A timely Request for Review of a denial of an extension of an established deadline, an exception to any other administrative requirement, or a denial of remedy requested based on a grievance regarding the administration of an NAFTA examination, will be finally reviewed by the NAFTA Review Panel no later than 60 calendar days after receipt of the Request for Review.

Based on its review of the Review Record, and consideration of testimony provided during a hearing, if any, the Review Panel may, at its discretion, take one of the following actions:

- Affirm the Adverse Decision,
- Modify the Adverse Decision, or
- Reverse the Adverse Decision.

The individual shall be notified in writing of the Review Panel's action, including the reasons therefor, within thirty (30) calendar days after the Review Panel reaches its decision.

THE REVIEW PANEL'S DECISION ON ADMINISTRATIVE MATTERS SHALL CONSTITUTE THE FINAL DECISION OF THE NAFTA ON THE MATTER AND SHALL NOT BE SUBJECT TO APPEAL ABSENT EXTRAORDINARY CIRCUMSTANCES, AS DETERMINED SOLELY BY THE NAFTA.

E. Review of Adverse Substantive Decisions or Reportable Disciplinary Actions: A timely Request for Review of an adverse substantive decision or reportable disciplinary action shall be considered by the NAFTA Review Panel no later than 90 calendar days after receipt of the Request for Review. Based on its review of the Review Record, and consideration of testimony provided during a hearing, if any, the Review Panel may, at its discretion, take one of the following actions:

- Affirm the Adverse Decision,
- Modify the Adverse Decision, or
- Reverse the Adverse Decision, in which event the decision of the Review Panel shall constitute the final decision of the NAFTA on the matter.

The Respondent shall be notified in writing of the Review Panel's action, including the reasons therefor, within thirty (30) calendar days after the Review Panel reaches its decision. The notice shall state the reason(s) for the Review Panel's decision and shall inform the Respondent that, in the case of an affirmed or modified decision, he or she has the right to seek a discretionary appeal of the Review Panel's decision by filing a timely written Request for Appeal to the NAFTA Executive Committee.

THE APPEAL PROCESS

A. Request for Discretionary Appeal of Adverse Substantive Decisions or Reportable Disciplinary Action: A Respondent who has received notice that an adverse substantive decision or reportable disciplinary action has been affirmed or modified by the Review Panel may appeal to the NAFTA Executive Committee by filing a

written Request for Appeal to the NAFTA Executive Committee. To be valid, the Request for Appeal must be postmarked within 30 calendar days after the date of the notice of decision and must state with specificity the grounds on which the Respondent is requesting the appeal. The information submitted in the Request for Appeal shall be limited to that submitted to the Review Panel. New information shall not be considered on appeal. If such information was not available at the time of the Review Panel's review, but becomes available within 30 calendar days after the date of the notice of the Review Panel's decision ("Valid New Information"), the Respondent may submit such Valid New Information for reconsideration by the Review Panel.

If a Request for Appeal is not postmarked within 30 calendar days, the Review Panel's decision shall constitute the final decision of the NAFTA on the matter and shall not be subject to appeal absent extraordinary circumstances, as determined solely by the NAFTA

B. Consideration of a Discretionary Appeal: A timely Request for Discretionary Appeal of the Review Panel's decision shall be considered by the Chair of the Executive Committee. The decision to grant an Appeal is at the sole discretion of the Chair of the Executive Committee, who shall seek advice of counsel.

If the Chair determines that the specific grounds on which the Respondent has requested an appeal do not raise a question of a procedural error or an arbitrary and capricious decision, he or she shall deny the Appeal. IF A REQUEST FOR APPEAL IS DENIED, THE REVIEW PANEL'S DECISION SHALL CONSTITUTE THE FINAL DECISION OF THE NAFTA ON THE MATTER AND SHALL NOT BE SUBJECT TO FURTHER APPEAL. The Respondent shall be notified in writing of the final decision, including the reasons therefore, within thirty (30) calendar days after the Chair reaches his or her decision.

If the Chair determines that the specific grounds on which the Respondent has requested an appeal do raise a question of procedural error or an arbitrary and capricious decision, he or she shall grant the Appeal. In such event, the appeal will be heard by the Executive Committee at its next regularly scheduled meeting occurring at least 30 calendar days after receipt of the Request for Appeal.

C. Standard of Review: The Executive Committee's review shall be limited to a determination of whether (1) a procedural error may have contributed to the Review Panel's decision or (2) the Review Panel's decision was arbitrary and capricious.

Any member of the Executive Committee who was a member of the Review Panel and participated in prior consideration of the Adverse Decision shall not participate in deliberations regarding, or vote on, the matter.

D. Appeal Procedure: The Executive Committee shall consider the Review Record, the Review Panel's Notice of Affirmation or Modification of Adverse Decision, the Respondent's Request for Appeal, and the record of the hearing if one was conducted before the Review Panel. The Executive Committee also shall receive and review a statement from the Chair of the NAFTA Review Panel that made the adverse decision. The foregoing shall constitute the Appeal Record.

The Executive Committee shall base its review solely on the Appeal Record and shall determine by majority vote of those members present whether to (1) ratify, reverse or modify the Adverse Decision; or (2) remand the matter back to the Review Panel for correction of a procedural error. If during the course of its review, the Executive Committee finds Valid New Information, it shall discontinue the review and remand the matter back to the Review Panel for reconsideration.

A DECISION BY THE EXECUTIVE COMMITTEE TO RATIFY, REVERSE, OR MODIFY AN ADVERSE DECISION SHALL CONSTITUTE THE FINAL DECISION OF THE NAFTA ON THE MATTER AND SHALL NOT BE SUBJECT TO FURTHER APPEAL.

IF THE REVIEW PANEL, ON REMAND, CORRECTS THE PROCEDURAL ERROR BUT REACHES THE SAME DECISION, THAT DECISION SHALL CONSTITUTE THE FINAL DECISION OF THE NAFTA ON THE MATTER AND SHALL NOT BE SUBJECT TO FURTHER APPEAL.

The Respondent shall be notified in writing of the final decision, including the reasons therefore, within thirty (30) calendar days after the Executive Committee or the Review Panel reaches its decision.

SUBMISSIONS TO NAFTA

Whenever there is a requirement for a written notice, request or other writing to be submitted to the NAFTA, such writing shall be addressed to the following:

The procedures set forth above for the review and appeal of Adverse Decisions may be subject to an expedited schedule when deemed necessary by NAFTA

Expired Certification

A certificant may submit an appeal for review of recertification if the certification has been expired for longer than 12 months.

Conditions of appeal include:

- Military duty or deployment which adversely affects access to continuing education courses
- Serious illness or accident, or serious illness or death of an immediate relative that may have adversely affected your ability to obtain CEU's
- Financial hardship
- Professional career demands adversely affecting time or access to continuing education courses

An appeal and recertification application postmarked after 12 months of the certification's expiration date will be subject to an increased renewal rate.

In the event of a positive appeal decision, the certification will be renewed for two years from the original expiration date.

A Recertification Appeal Form may be found as Exhibit L.

Appeals are submitted for review via mail and/or email:

NAFTA
Attn: Appeals Department
16495 N 113th Way
Scottsdale, AZ 85255
naftaappeals@NAFTAFITNESS.org

CERTIFICATION CREDENTIAL GUIDELINES

Who May Use NAFTA's® Certification Trademarks and Logo?

Authorized Dealers and anyone licensed by NAFTA, INC. have the right to promote and use the trademarks so long as such advertising follows the method of use outlined in this guide. Instructors holding the credential who have met all the certification program requirements can use the title NAFTA® Certified Group Exercise Instructor. We ask that our dealers or Official NAFTA® Certified Group Exercise Instructors contact us immediately if they become aware of any unauthorized or improper use of the logo trademarks.

Ways in Which the Trademarks Should Not Be Used

- With the letter “N” not capitalized.
- Purposely misspelled: For example, Nafta, nafta.

Proper Use of the Certification logo

Precise and consistent presentation of our corporate identity is a very important component of brand management. The certification logo is the most important visual element of our brand. This graphic identifier ties together all of our communication efforts. To ensure that its visual impact has a maximum effect, the logo must be used in a coordinated and consistent manner. This section is designed to define and clarify its usage.

Primary Logo:



Secondary Logos:



Congratulations! As a NAFTA certified Group Exercise Instructor, you now join hundreds of NAFTA certified instructors around the world! As a NAFTA Group Exercise Instructor, you are expected to adhere to the guidelines by which the credential is indicated and displayed. The credentials should always be presented following the standard format below.

1. Your name is indicated followed by a comma and a space. The credential is then placed after your name as NAFTA-GEI using all capital letters and no spaces between the hyphen. Example: Charlie Doe, NAFTA-GEI
2. Higher education degree abbreviations should be placed after your name and before the certification credential. Example: Charlie Doe, Ph.D., M.S., NAFTA-GEI
3. Multiple NAFTA credentials should be listed in the following order: 1st- GEI 2nd- PFT 3rd- secondary specialty certifications. Example: Charlie Doe, Ph.D., M.S, NAFTA-GEI, NAFTA-

PFT, NAFTA-Kickboxing

4. When the certification name is written out, all words are capitalized and the & symbol is used.
Example: National Aerobics & Fitness Trainers Association Group Exercise Instructor
5. The certification seal may not be used in a proprietary manner without the written permission of NAFTA.

MAINTAINING THE CERTIFICATION

NAFTA certifications are valid for two years, expiring on the last day of the month in which the certification was earned two years prior. In order to maintain current certification, NAFTA Certified Professionals are required to complete 15 hours (15.0) of continuing education biennially. As stated in the NAFTA Code of Ethics, NAFTA Certified Professionals agree to remain up-to-date on the latest health and fitness research and understand its practical application.

First and foremost, the purpose of NAFTA's recertification requirements is to reinforce and improve the certificant's competencies to safeguard the health and safety of the general public. NAFTA Certified Professionals are encouraged to remain current with the latest research, professional standards, and guidelines in the health and fitness industry by completing continuing education which, at a minimum, maintains current NAFTA GEI competencies, and ideally advances knowledge, skills, and abilities. This supports the association of NAFTA's credential with professional, competent, and safe fitness instructors. Second, NAFTA believes that continuing education increases professional accountability, relevancy, and growth improving proficiency to further advance one's professional career.

Continued Competency should demonstrate specific levels of knowledge, skills, etc., not only at the time of initial certification but throughout one's professional career. This is done through continued education and recertification.

Given the dynamic nature of the fitness industry and the vast amount of exercise science research published annually, it is imperative for fitness professionals to complete continuing education on a regular basis. NAFTA encourages certificants to remain current with research, trends, and evolving standards to further their career, increase competencies, and better respond to the needs of the client. The two-year certification cycle adopted by NAFTA aligns with industry standard and facilitates a regular cycle of learning. During this two-year period, NAFTA Certified Professionals are required to complete a minimum of 15 hours of NAFTA-approved continuing education. Both the two-year term for NAFTA certifications and an average of 10 hours per year of continuing education are in line with accredited health and fitness certification programs.

NAFTA requires 15 hours (15.0 CEU) of continuing education as a minimum requirement to maintain an NAFTA certification. NAFTA encourages its certified professionals to complete additional continuing education as necessary to advance their careers and services provided to the public.

RECERTIFICATION POLICIES AND PROCEDURES

NAFTA certified professionals must comply with the following every two years to maintain the certifications:

1. Complete a minimum 15 hours (15.0 CEU; 1 hour=0.1 CEU) of NAFTA-approved continuing education credits (CEU), with a minimum of 3 of these CEUs earned by attending a NAFTA

workshop or completing NAFTA home study courses.

2. Additional Certifications – When renewing multiple certifications simultaneously, a total of 15 CEU's is required, with a minimum of 3 these CEUs being earned by attending a NAFTA workshop or completing NAFTA home study courses. You do not need to submit 15 CEU's for each certification.
3. Additional Certifications – When NOT renewing multiple certifications simultaneously, but renewing each certification on separate cycles: 15 CEUs per certification at the recertification cycle, with a minimum of 3 of these CEUs being earned by attending a NAFTA workshop or completing NAFTA home study courses. NAFTA recommends renewing multiple certifications simultaneously for financial savings.
4. Maintain current cardiopulmonary resuscitation (CPR) and automated external defibrillator (AED) certificate(s) (CPR only for NAFTA certified professions outside the US and Canada.). This certification must be current at time of renewal. The certificant is responsible for maintaining current CPR/AED certification. NAFTA is not responsible for notifying certificants of the status of this certification.
5. Remain in good standing with NAFTA.
6. Submit renewal documentation and payment online, via secure fax, or mail postmarked prior to the expiration date for the certification.
7. Approximately 10% of the Recertification Applications are reviewed and verified for accuracy.

Renewal rates are scheduled to recognize individuals who hold multiple credentials and to provide discounts for online renewals.

	ONLINE	MAIL
First Certification		
On-time renewal	\$138	\$138
Additional Certifications *		
On-time renewal for 2 certifications	\$123.50 each	\$123.50 each
On-time renewal for 3 certifications	\$99 each	\$99 each
On-time renewal for 4 certifications	\$89 each	\$89 each
Expired Certifications		
Up to 3 months late	\$138 each	\$138 each
Over 3 months, up to 12 months late	\$199 each	\$199 each

*Table 2 Recertification schedule of fees. * Rates based on total number of current certifications at time of recertification. Prices subject to change.*

NAFTA certified professionals may renew their certification at any point during their certification cycle, however, CEU's may only be accrued for the current certification cycle and cannot be applied to future cycles.

The recertification application form (Exhibit I) is available in the Recertification Handbook and may be completed via NAFTA's Certified Professional web account. The form may also be downloaded and submitted via secure fax or mail (<https://www.NAFTAfitness.org/resources/Renewal.pdf>). Renewal submissions must contain all information as indicated to be processed. Credentials will not

be considered renewed until all required documentation is received.

NAFTA notifies certificants via email six months prior to the expiration date of their current certification, and also emails notifications at 90 and 30 days prior to the expiration date. The email content includes the expiration date of the currently held certification(s), the recertification policy, methods to attain NAFTA-approved CEU's, and instructions for applying for recertification. Credential holders also have access to their personal NAFTA account to verify status of their credential(s), check on their expiration date, update and verify CEU's and CPR/AED information on file, and to renew their credential.

Professionals who hold more than one NAFTA certification may apply the same CEU's to more than one certification for renewal, provided that the subject matter is appropriate for continuing education for the NAFTA certifications which the CEU's are applied. Each credential has a renewal fee (see table above) and CPR/AED must be current at the time of renewal.

Questions regarding maintaining credentials may be directed to NAFTA Educational Services email at EducationalServicesMail@NAFTAfitness.org.

Recertification Auditing Policy

NAFTA supports recertification as a means of encouraging individuals to continue activities essential to the maintenance of knowledge and continuing competence required for their level of practice and certification in the field of personal training. Certificates who choose to recertify must submit their renewal application and applicable fees. NAFTA relies on the honesty and professional integrity of its certificants who attest in a truth statement that they have completed fifteen hours (15) continuing education (CE) and have an active CPR AED certification within their two-year recertification period. However, NAFTA conducts regular audits of a minimum of 10% of all applications submitted for recertification. Certificants with applications selected for audit are required to provide, supporting documentation regarding their earned CEs and CPR AED certification. All CE's must have been completed on or before the date the recertification application is submitted. Those who successfully meet and pass the audit criteria will have their certification renewed for a 2-year period. Certificants who do not meet and pass the audit criteria will be notified by NAFTA and provide CEs within NAFTA's recertification policy. Certificants have the option to appeal the decision to the CAB under special reconsiderations.

Expired Certifications

NAFTA accepts recertification applications for the Group Exercise Instructor exam up to six (6) months past the credential's expiration date. Credentials which have been expired for more than six months may be reinstated by repeating the GEI exam to recertify or through the appeals process described below.

If a credential expires before or during the recertification process, the credential is considered expired and the individual is no longer considered a current NAFTA Certified Professional for that credential. The individual may no longer use the credential designation.

Additional fees will be associated with processing the application for expired certifications. Individuals submitting applications for recertification up to six months after the certification expiration must submit the renewal via mail or secure fax, with all required paperwork, including full renewal and late fees. The certification is not considered renewed until all required documentation and fees are received.

Recertification Appeals Policy

A certificant may submit an appeal for review of their recertification if the credential has been expired for longer than 6 months.

Conditions for appeal include:

- Military duty or deployment which adversely affects access to continuing education courses
- Serious illness or accident, or serious illness or death of an immediate relative that may have adversely affected your ability to obtain CEU's
- Financial hardship
- Professional career demands adversely affecting time or access to continuing education courses

A certificant must submit a Recertification Appeals Form (Exhibit J) (<https://www.naftafitness.org/resources/appeal.pdf>) with the Recertification Application and required documentation and fees.

An appeal and recertification application postmarked more than 6 months after the credential's expiration date will be subject to an increased renewal rate.

In the event of a positive appeal decision, the credential will be renewed for two years from the original expiration date.

Continuing Education Units (CEU)

NAFTA's Professional Education Department reviews and approves over 3,000 continuing education courses from over 300 providers each year. This provides NAFTA Certified Professionals with ample opportunities to earn their CEU's for certification renewal. All NAFTA-approved CEU's can be found via the continuing education course search engine on the NAFTA website http://www.NAFTAfitness.org/cec_course/, where NAFTA-approved CEU's can be searched by career track specializations, topic, CEU provider, course format (at home, conference, in class), CEU value, course start date, and location. This is a professional benefit to all NAFTA Certified Professionals and can be searched by all fitness and allied health professionals worldwide. Certificants may contact NAFTA Educational Services via phone at 480-758-5119, or via email at EducationalServicesMail@NAFTAfitness.org for further information regarding continuing education programs.

NAFTA recognizes that professional development and continuing education can come from sources other than traditional NAFTA-approved continuing education courses. Such sources include:

1. College course completion with a grade of 'C' or higher, with 0.8 CEU awarded per Quarter unit and 1.0 CEC awarded per Semester unit.
2. Passing an additional NAFTA certification exam results in 2.0 CEU for the studying involved in preparing for the certification.
3. Professional presentations can earn up to 0.5 CEU per renewal cycle for the research involved in developing the presentation.
4. Authorship of a correspondence course can earn up to 0.5 CEU per renewal cycle for the research involved in developing the course.
5. Serving on an NAFTA committee results in 0.5 CEU per calendar year.
6. Obtaining another NCCA-accredited fitness related certification results in 0.5 CEU.
7. Publishing fitness related articles, book chapters, books, or peer-reviewed journal articles can result in a maximum of 0.5 CEU per renewal cycle.

8. Clinical observation of surgical procedures that can enhance the understanding of human systems that relate to the certification can be worth a maximum of 0.2 CEU per renewal cycle.
9. Internships in a fitness or related setting can result in up to 0.2 CEU per renewal cycle (for college credit internships, see college course information above).
10. Community outreach in a fitness related event or similar can result in 0.1 CEU per renewal cycle.

Continuing Education Petitions

NAFTA recognizes that there are quality educational courses, workshops, and conferences that are not submitted in advance to the NAFTA Academy for review and awarding of NAFTA continuing education credits/units, and may not be included in NAFTA's Continuing Education Petition process. In the event that a credentialed individual completes educational coursework that has not been reviewed and approved for NAFTA CEU, he or she may submit a petition for each individual course completed for consideration as continuing education for renewal. Each submitted petition must contain a copy of the course materials with course syllabus or outline, learning objectives, the course instructor's resume or curriculum vitae including academic background and/or certifications, and verification of course completion. A \$25.00 petition fee is assessed for an initial course petition and \$10 per each additional course being petitioned.

Petitions are reviewed by NAFTA Professional Services according to criteria established by the NAFTA Academy with input from NAFTA's Director of Credentialing. A petitioned course will be awarded continuing education credits only if it meets similar criteria to what is required for courses to be approved in advance by the NAFTA Academy. This includes the instructor holding a four-year college degree higher in exercise science or a related field to the subject areas taught (e.g., nutrition degree for nutrition related topics), and the course content must be appropriate to advance the knowledge, skills, and abilities of the professional holding the specific NAFTA certification for which the course is being petitioned. For each hour of educational content, 0.1 CEU will be awarded. No CEU's are awarded for activity classes, topics that fall outside of the scope of practice or are deemed inappropriate for the credential, or time dedicated to testing at the completion of a certificate program. Reviews will be completed within 15 days of receipt, after which the individual will be notified as to the final decision from NAFTA Educational Services. Courses that are not approved will not be refunded the \$25.00 petition review and processing fee. The Course Petition Form (Exhibit K) is available for download from the NAFTA website (<https://www.NAFTAfitness.org/resources/Petition.pdf>).

Maintaining Your CPR and AED Certifications

NAFTA strives to prepare our certified fitness professionals to competently serve the general public. NAFTA expects NAFTA certified professionals to be prepared to respond in the event of an emergency while working with clients and the public. As such, and in alignment with industry standards, NAFTA requires certificants to maintain a current adult CPR/AED certification.

NAFTA EDUCATIONAL SERVICES

NAFTA's Educational Services Department is available to support NAFTA Certified Professionals in maintaining their NAFTA certifications. NAFTA's Educational Services team consists of health and fitness professionals, all holding a minimum of one NAFTA certification, with a background and experience in the health and fitness industry. The Educational Services team is situated to support NAFTA in the following areas:

- Certification renewal process
- Navigating NAFTA's Pro Site
- Career benefits
- Status of certification
- CEU status
- Liability insurance
- Secondary certification
- Available CEU courses
- Eligible CEU activities
- Practical Training

It should be noted that any and all educational services provided by the Educational Services Department are developed independently and are autonomous of those activities related to exam development.

The Educational Services Department is available via phone 214-771-6167 or via email at EducationalServicesMail@NAFTAfitness.org.

RECORDS MANAGEMENT AND RETENTION POLICY

The purpose of NAFTA's Records Maintenance and Retention Policy is to ensure that full and accurate recordings of NAFTA's activities are maintained and/or disposed of properly in accordance with good management practices. This policy will serve to protect the full transparency of the association, provide accountability for all stakeholders, and support the administration of the association. This policy applies to all forms of records, including electronic.

NAFTA is committed to retaining and managing all forms of records in authentic and accessible form for as long as required.

All NAFTA staff are required to attend Records Management Information and HIPAA training annually and adhere to the best business practices established within these training modules.

All NAFTA staff, employees, consultants, and vendors are expected to abide by these policies and procedures for records maintenance when supporting NAFTA business activities.

Key Components of Records Management

- Create and Capture
 - Staff shall create official records of all decisions and actions made in the course of their official business. In the event activities are conducted by phone or in conversation, staff shall document key points in the conversation, date stamp, and file appropriately.
 - Minutes shall be taken and recorded for all official meetings. These minutes shall be reviewed for accuracy and to ensure full capture of significant activities, date stamped and filed appropriately.
 - Staff are expected to manage all incoming electronic records and store in the appropriate files.
 - Incoming paper records must be date stamped and filed appropriately. Where applicable, incoming paper documents shall be scanned, given an appropriate file

- name/title and placed in the appropriate electronic folder of the shared drive.
 - Copies of all official outgoing letters, faxes, shall be date stamped and filed appropriately, and/or scanned and stored in the relevant electronic folder on the shared drive.
 - In the event of new business systems or programs, the NAFTA Executive Director will determine and direct what records and activities shall be captured.
- Store
 - Electronic records shall be retained online or offline when appropriate for access, historical purposes, or ease of use (on CD ROMs, DVDs, magnetic disks or other removable media). This includes documentation of social media activity to ensure these activities are retained and in the custody of NAFTA.
 - Physical records shall be retained in appropriately marked files and folders as part of a secure, double locked filing system.
 - Records of short-term value shall be labeled as such within paper and online files. Records of long-term value shall be labeled as such within paper and online files.
 - Records of long-term archival value shall be stored online whenever possible and labeled as such. Any staff unclear as to the significance of records for this purpose shall consult their supervisor or the Executive Director.
- Maintain and Monitor
 - NAFTA staff shall immediately notify the Executive Director in the event of a records request, file damage, or incidence that has or may damage the integrity of a record or file, or place association or personally identifiable information at jeopardy.
 - NAFTA staff is expected to ensure working files are appropriately labeled and maintained as part of the larger association system.
 - Any change in location of a file shall be recorded to ensure all file assets remain accounted for.
 - The Executive Director is responsible for ensuring all records, paper and electronic, are monitored regularly to protect the records. This includes oversight of any and all contract managed electronic records storage to ensure files are backed up and securely stored, and records are fully migrated when necessary.
- Dispose and Archive
 - The official disposal or destruction of any records relating to NAFTA functions, activities, contracts and responsibilities including financial and personnel records must be done so in accordance with this policy and approved by the Executive Director.
 - No NAFTA staff shall dispose or destroy official NAFTA records or files without the expressed knowledge of their immediate supervisor and in doing so in accordance with this policy.
 - Archiving of records shall be conducted in line with good management practice.
- Access
 - Records shall be available to all authorized staff and management that require access for official business purposes.
 - All NAFTA staff shall safeguard access to official records, files, and personally identifiable information as part of their daily responsibilities.
 - All NAFTA staff are expected to only allow records access to other NAFTA staff when

necessary to conduct official association business.

- Independent Consultants, Vendors, and Out sourced suppliers
 - All independent consultants, vendors, and outsourced suppliers shall abide by the policies set forth in this Records Management policy.
 - All records created by contractors performing work on behalf of NAFTA belong to NAFTA. This includes the records of contract staff working at all NAFTA service areas as well as external service providers.
 - All supporting contracts shall clearly state that ownership of records resides with NAFTA, and instructions regarding creation, management, and access to the records falls under the jurisdiction of NAFTA.
 - The Executive Director is responsible for the creation, terms, and oversight of all contracts.

Records Content

Certification Holders Records (Permanent)

- Initial Application
- Recertification application documents
- Reasonable Accommodation requests
- Appeals records

Disciplinary Actions (Permanent)

- Active
- Closed

Examination Records (Permanent)

- Item bank and associated specific items files
- All forms of the examination
- Role delineations/job analysis documentation
- Documentation of cut score determination process
- Candidate examination responses
- Candidate correspondence regarding pass/fail

Administrative Records (Permanent)

- Board of Director meeting minutes
- Versions of policy and procedures manuals
- Bylaws and legal documents (contracts/agreements)
- Annual Reports
- Statistical reports

Release of Records

- Certificants can request that their records be released via an official letter requesting that their records be released.
 - Official Letter must:
 - include certificant information such as: last four of social security number, address, phone number and dated/signed by the certificant.
 - provide detailing information to whom the records are to be released (name of person/company, address, phone number and other relative information.)
 - request must be faxed or mailed due to Personal Information.

Retention Policy

Permanent record retention is required for the following records:

- Official minutes of Board of Director meetings
- Certification Annual Reports
- Copies of certification policies and procedures, and updates
- Records of all appeals and disciplinary actions
- Candidate identification information with certification status and examination dates
- Records of accommodations requests and determinations
- Copies of role delineation/job analysis documentation
- Documentation of cut score determination process
- Statistical reports
- Full records of candidate examination responses
- Other materials as determined by the Executive Director or BOD

A three (3) year retention period is required for the following records unless a longer period is stipulated, or required by state or federal law:

- General correspondence regarding certification issues
- Financial records
- Contracts/consultation agreements (7 years)
- Research reports
- Forms of the examination

No retention period is required for the following documents

- Draft documents
- Reminder notes
- Duplicate copies of records no longer needed
- E-mails not covered under the preceding time limits

Destruction

The Executive Director is responsible for the ongoing process of identifying records, which have met the required retention period and overseeing their destruction. Destruction of paper financial and personnel-related documents will be accomplished by shredding. Destroyed documents shall be documented to include date, method of destruction, description and dates covered of destroyed records, and signature of supervising individual.

Document destruction will be suspended immediately, upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation.

PROFESSIONAL PRACTICE AND DISCIPLINARY POLICY

The Professional Practice and Disciplinary Policy was developed for the express purpose of protecting the public interest and to create the absolute highest standards for professional and ethical conduct.

NAFTA CODE OF ETHICS

These principles of professional conduct make up NAFTA's Code of Ethics. During the exam registration process, candidates must affirm their agreement to uphold NAFTA's Code of Ethics throughout NAFTA's certification process and in their professional work as a NAFTA certified professional.

As an NAFTA Certified Professional, I am guided by the National Aerobics & Fitness Trainers Association's principles of professional conduct whether I am working with clients, the public or other health and fitness professionals. I promise to:

- Provide safe and effective instruction.
- Provide equal and fair treatment to all clients.
- Stay up-to-date on the latest health and fitness research and understand its practical application.
- Maintain current CPR and AED certificates and knowledge of first-aid services.
- Comply with all applicable business, employment and intellectual property laws.
- Uphold and enhance public appreciation and trust for the health and fitness industry.
- Maintain the confidentiality of all client information.
- Refer clients to more qualified health or medical professionals when appropriate.
- Establish and maintain clear professional boundaries.

Standards of Professional Practice

Each NAFTA staff and certified professional must practice with honesty, integrity and lawfulness. In his/her professional role, the staff member and certified professional shall:

1. Maintain adequate and truthful records and progress notes.
2. Accurately and truthfully inform the public of services available and rendered.
3. Honestly and truthfully represent all professional services, qualifications and affiliations.
4. Advertise in a manner that is honest, dignified and representative of services that can be delivered without the use of provocative and/or sexual language and/or pictures

Confidentiality and Non-Disclosure Policy

The purpose of the following Examination Confidentiality and Non-Disclosure Policy is to establish and explain the rules by which NAFTA's BOD will strictly limit, control, and protect all confidential, private, and/or proprietary information concerning certification examinations and the certification process, as well as other materials so designated by NAFTA's BOD. The nature of NAFTA's business and the economic well-being of the organization are dependent upon protecting and maintaining all designated confidential information.

All NAFTA operations, methods, materials, documents, procedures, and proceedings relating to certification tests and examinations (NAFTA test information) are considered private, confidential,

and proprietary information by NAFTA's BOD. All NAFTA certification test information is to remain secure and confidential.

Persons Covered By The Policy/Agreements To Abide By The Policy Terms

The receipt and use of NAFTA test information and materials is limited strictly to authorized NAFTA Board Directors, employees, agents, volunteers, contractors, and representatives. All persons identified in this policy must agree to abide by, and comply with, this Policy and all Policy requirements in writing. Each NAFTA Board Director, employee, agent, volunteer, contractor, and representative may be subject to discipline or other sanction by NAFTA due to a violation or attempted breach of any portion of this Policy. NAFTA reserves the right to enforce this Policy by any and all appropriate and legal means.

In addition to other obligations, all NAFTA Board Directors, employees, agents, volunteers, contractors, and other authorized representatives will be bound by all the provisions of this Policy during the course of their employment or association with NAFTA, and will continue to be bound by such provisions after termination of their employment or association with organization.

The obligation to adhere to, and be bound by, the Policy is one that continues beyond the association or employment of representatives, staff, and agents of NAFTA.

Information and Materials Protected

Test information and materials covered and protected by this Policy include, but is not in any way limited to: candidate application status; certification examination questions and answers; examination scores; individual or group performance information; general or specific data regarding test questions, reviews, changes, modifications; and, all other information and materials related to the content, development, and administration of NAFTA certification examinations.

In addition, any information relating to NAFTA certification examination materials, composition techniques, structure, methods and other similar areas is also proprietary, private, and strictly confidential and will not be released without specific, prior, and written authorization from NAFTA's BOD, including, but in no way limited to, specific information which identifies, or makes possible the identification of, a particular person or candidate.

Furthermore, the identities of the Video Practice Examiners will not be released by NAFTA to candidates or third parties.

All personnel, including subject matter experts, independent consultants and vendors, with access to confidential test items, shall not be eligible for the exam, or eligible to prepare or deliver any preparation course or materials. Any personnel, including subject matter experts, independent consultants and vendors, with access to confidential test items are eligible to sit for the exam after (2) two years of the implementation of the first exam.

Information and material which falls outside the protection of this Policy is limited to the following:

- Information which is in the public domain or available as a matter of public record;
- Information specifically authorized to be disclosed by the candidate pursuant to an original, signed authorization of release by that candidate; and,

Information which a NAFTA representative is obligated to produce pursuant to a valid and lawful court or government order, following prior, written approval of NAFTA's BOD, and NAFTA Legal Counsel.

CONFLICT OF INTEREST POLICY

The purpose of the conflict-of-interest policy is to protect NAFTA's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an Officer or Director of the organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations. Each Director or Officer of the BOD shall sign a conflict of interest agreement, annually, affirming that he/she:

- Has received a copy of the conflict-of-interest policy.
- Has read and understands the policy.
- Has agreed to comply with the policy.

Additionally, from the time they complete their assignment they must wait 2 years before they may work on any preparation materials related to the exam.

Definitions

Interested Person

Any Director or Officer of the BOD, who has a direct or indirect financial interest, as defined below, is an interested person.

Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- ❖ An ownership or investment interest in any entity with which NAFTA has a transaction or arrangement.
- ❖ A compensation arrangement with NAFTA or with any entity or individual with which NAFTA has a transaction or arrangement.
- ❖ A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which NAFTA is negotiating a transaction or arrangement.
- ❖ Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.
- ❖ A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the BOD decides that a conflict of interest exists.

Procedures

Duty of Disclosure

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the BOD considering the proposed transaction or arrangement.

Determining Whether a Conflict of Interest Exists

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he or she shall leave the BOD meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Directors shall decide if a conflict of interest exists.

Procedures for Addressing the Conflict of Interest

An interested person may make a presentation at the BOD meeting, but after the presentation, he or she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest (Recusal).

The Chair of the BOD, if appropriate, may appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

After exercising due diligence, the BOD shall determine whether NAFTA can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the BOD shall determine by a majority vote of the disinterested Directors whether the transaction or arrangement is in the organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

Violations of the Conflicts of Interest Policy

If the BOD has reasonable cause to believe a constituent member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

If, after hearing the member's response and after making further investigation as warranted by the circumstances, the BOD determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Records of Proceedings

The minutes of the BOD and all committees with board-delegated powers shall contain:

The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the BOD decision as to whether a conflict of interest in fact existed.

The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Compensation

A voting member of the BOD who receives compensation, directly or indirectly, from the organization for services is precluded from voting on matters pertaining to that Director's compensation.

A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the organization for services is precluded from voting on matters pertaining to that member's compensation.

No voting member of the BOD whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Annual Statements

Each Director or Officer of the BOD shall sign a statement, upon the beginning of his or her term that affirms such person:

- ❖ Has received a copy of the conflict-of-interest policy.
- ❖ Has read and understands the policy.
- ❖ Has agreed to comply with the policy.

Understands the organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

Periodic Reviews

To ensure the organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's-length bargaining.

Whether partnerships, joint ventures, and arrangements with management organizations conform to the organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or in an excess benefit transaction.

Use of Outside Experts

When conducting the periodic reviews, the organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the BOD of its responsibility for ensuring periodic reviews are conducted

Recusal

Any employee, independent consultant, subject matter expert, or vendor is required to recuse oneself from participation in any related activity or duty in which financial or personal situations may unduly influence his/her judgement or work performance, or where there may be an appearance of conflict of interest. Recusals may be verbally submitted to one's supervisor, however, written recusals are recommended to ensure clarity of scope and documentation of recusal.

WHISTLE BLOWER POLICY

All NAFTA personnel, including vendors, are required to uphold the highest standards of business and personal ethics while conducting business for and with the association, as well as representing the association. All NAFTA personnel and vendors are expected to conduct business and represent the association with honesty and integrity and in compliance with applicable laws and regulations.

The purpose of this policy is to provide clarification and support for all NAFTA personnel and stakeholders in the reporting of perceived or actual illegal, unethical, or inappropriate behavior or practice within the association. All NAFTA personnel are responsible for reporting violations of NAFTA's Code of Ethics, or unlawful or unethical acts that violate the laws and regulations governing NAFTA's operations.

An individual shall immediately report any perceived or actual event to his/her supervisor.

If the individual is not able, uncomfortable, or reluctant to report to his/her supervisor, the individual shall report the event to the next highest level of management, including the Executive Director or member of the BOD.

The individual may report the event with his/her identity or anonymously.

The individual shall receive no retaliation or retribution for a report that was provided in good faith and not done primarily with malice to damage another, NAFTA's credential, or the association.

An individual who makes a report that is not done in good faith is subject to discipline, including termination of the Board or employee relationship, or other legal means to protect the integrity and reputation of the association and members of its Board and personnel.

Anyone who retaliates against the individual who reported an event in good faith will be subject to discipline, including termination of Board or employee status.

Crimes against person or property, such as assault, rape, burglary, etc., should immediately be reported to local law enforcement personnel.

Supervisors, managers and/or Board members who receive the reports must promptly act to investigate and/or resolve the issue.

The individual reporting the event shall receive notice within 30 business days of the initial report, regarding any findings, or resolution of the issue.

If the investigation of an event, that was done in good faith and investigated by internal personnel, is not to the reporting individual's satisfaction, then he/she has the right to take further action independent of the association.

The identity of the reporting individual, if known, shall remain confidential to those persons directly involved in applying this policy, unless the issue requires mediation between the parties to resolve at

which time the reporting individual must provide authorization to release his/her identity to facilitate the process. If the event requires investigation by law enforcement, the identity of the reporting individual may be required, and in which case members of the organization may be subject to subpoena.

NAFTA PROFESSIONAL DISCIPLINARY PROCEDURES

The professional practices and disciplinary procedures of the National Aerobics & Fitness Trainers Association (NAFTA) are intended to assist and inform certificate holders, candidates for certification and the public of NAFTA's Certification Standards relative to professional conduct and disciplinary procedures. NAFTA may revoke or otherwise take action with regard to the application or certification of an individual in the case of:

1. Ineligibility for certification.
2. Irregularity found in connection with any certification examination.
3. Unauthorized possession, use, access, or distribution of certification examinations, score reports, trademarks, logos, written materials, answer sheets, certificates, certificate holder or applicant files, or other confidential or proprietary NAFTA documents or materials (registered or otherwise).
4. Material misrepresentation or fraud in any statement to NAFTA or to the public, including but not limited to statements made to assist the applicant, certificate holder, or another to apply for, obtain, or retain certification.
5. Any physical, mental, or emotional condition of either temporary or permanent nature, including, but not limited to, substance abuse, which impairs or has the potential to impair competent and objective professional performance.
6. Negligent and/or intentional misconduct in professional work, including, but not limited to, physical or emotional abuse, disregard for safety, or the unauthorized release of confidential information.
7. The timely conviction, plea of guilty, or plea of nolo contendere in connection with a felony or misdemeanor, which is directly related to public health and/or fitness instruction or education, which impairs competent and objective professional performance. These include, but are not limited to, rape, sexual abuse of a client, actual or threatened use of a weapon of violence, the prohibited sale, distribution, or possession with intent to distribute, of a controlled substance.
8. Failure to meet the requirements for certification or recertification.
9. Not adhering to the Standards of Professional Practice and/or the Code of Ethics.
10. Not cooperating with NAFTA, NAFTA and/or BOD investigations into alleged illegal or unethical activities. This would include, but is not limited to, not cooperating with appropriate committees by withholding information, not responding to requests for information in a timely manner, or providing misleading information to NAFTA committee or individual member.
11. Engaging in conduct that includes, but is not limited to, unauthorized use of NAFTA's name to endorse any products or services without proper authority or exploitation of a client for financial gain.

NAFTA has developed a three-tiered disciplinary process of review, hearing and appeals to ensure fair and unbiased examination of alleged violation(s) of the Application and Certification Standards in order

to (1) determine the merit of allegations; and (2) impose appropriate sanctions as necessary to protect the public and the integrity of the certification process.

All NAFTA staff and certified professionals shall be familiar with and comply with NAFTA's Code of Ethics and NAFTA Professional Practices and Disciplinary Procedures.

Test Development:

New test forms based on the new content outline following a JTA will always be created. JTAs are conducted approximately every five years. Should the number of exam administrations during this time exceed 500 candidates, a new form will be created (and for every 500 candidates thereafter). In order to maintain the item bank, once the number of exam administrations on the form has exceeded 200, those pretest items being used in the current form will be substituted with new pretest items. This will occur every time the form exceeds 200 administrations."

Exhibit A-Item Writer Non-Disclosure Form



Item Writer/Item Reviewer Non-Disclosure Form

I _____ (print name) agree to keep all information pertaining to NAFTA's certification exam confidential by adhering to the following:

Item writers must attest to the fact that they are not to transmit, divulge or otherwise communicate the content of any exam items they may have worked with or seen in the processes, including but not limited to, item writing, exam construction and review, cut score study or any other time items are reviewed.

Item writers shall:

- Destroy (shred or burn) any written drafts or copies of items, or notes relating to item development.
- Never keep copies of written items.
- When attending item writing workshops NEVER remove items, answer keys or any portion of an examination from the workshop room. Ensure the security of test materials at all times.
- For test development work performed via internet access, maintain technological security at all times. Keep password information in a secure location. Never leave your computer unattended if performing test-development work (online or otherwise) in a public space.
- Never ask anyone outside of NAFTA or NAFTA's staff to review or discuss items.
- Not work on or be privy to information related to any exam preparation materials, sample items or review guides for initial certification during the term of their commitment to write or review items for the exam.
- Not be eligible to sit for the certification exam or obtain the credential for two (2) years following commencement of their commitment to write or review items for the exam.

Signature of Item Writer

Date

Exhibit B-Candidate Reasonable Accommodations Request Form



Candidate Reasonable Accommodations Request Form

Name: _____ Date: ____/____/____
Last First M.I. Month/Day/Year

Daytime Telephone Number: () _____ Desired Test Date: _____

Email address: _____

Description of Disability:

Accommodations Requested (Check all that apply):

Accessible Facilities

Large Print Exam
Reader

Sign Language Interpreter
American Sign

Additional Time

Language

Time and a Half (x1.5) Double

Scribe/Writer

Cued Speech

Time (x2)

Hand Held Magnifier

Separate Testing Room

Other Equipment or Accommodation (Please explain):

Reasonable Accommodations previously provided to you—list accommodations received and purpose (e.g., "Sign language interpreter for NAFTA CPT examination")

I understand that NAFTA will use the information obtained by this authorization to review this reasonable accommodation request in regard to this examination by reason of my disability. I understand that NAFTA reserves the right to make additional inquiries regarding my disability and previous accommodations before authorizing the accommodations I have requested.

Candidate Signature

Date

Exhibit C-NAFTA Health Care Provider Certification Form

NAFTA HEALTH CARE PROVIDER CERTIFICATION FORM

Name of Candidate seeking NAFTA Certification

Last 4 digits of Social Security No.

The above-referenced individual has identified you as the health care provider who is treating the medical condition for which he/she is seeking reasonable accommodation. Attached is the candidate's signed HIPAA Consent Form. Please complete this certification form and return it in the envelope provided. Please write **legibly**; if clarification is needed, you will be contacted by a personnel representative. Thank you for your assistance.

Date of your last examination of this individual: _____

A. Major Life Activities

Does this person have a medical condition, that makes one or more of his/her major life activity/activities difficult to perform? Yes _____ No _____

If yes, the major life activity/activities affected is/are:

B. Duration of Medical Condition

Is this medical condition temporary? Yes _____ No _____

If yes, please state the expected duration of this condition:

C. Reasonable Accommodation Request

Please specify what type of accommodation is recommended for this patient as it pertains to an online examination or traditional paper and pencil examination setting:

D. Does the candidate's medical condition necessitate the proposed accommodation? Yes _____ No _____

Please explain:

I, the undersigned health care provider, certify that the information I have provided regarding the above-referenced individual is complete and accurate to the best of my knowledge. I understand that my cooperation is necessary to provide accurate determination regarding my patient's reasonable accommodation request.

Health Care Provider's Signature

Date

Provider's Name Printed

Provider's Phone number

License No.

Exhibit D-HIPAA Consent Form

HIPAA CONSENT FORM

AUTHORIZATION (CONSENT) TO PERMIT THE USE AND DISCLOSURE OF IDENTIFIABLE MEDICAL INFORMATION (PROTECTED HEALTH INFORMATION) FOR ACCOMMODATION PURPOSES

Candidate Name: _____

Accommodation Requested: _____

The Health Insurance Portability and Accountability Act (HIPAA) provides safeguards to protect your privacy. Implementation of HIPAA requirements officially began on April 14, 2003.

What this is all about: Specifically, there are rules and restrictions on who may see or be notified of your Protected Health Information (PHI). These restrictions do not include the normal interchange of information necessary to provide you testing services. HIPAA provides certain rights and protections to you as the patient. Additional information is available from the U.S. Department of Health and Human Services. www.hhs.gov

NAFTA has adopted the following policies:

- You the Candidate agree and understand that your diagnostician (whether a physician or other provider) may provide NAFTA with any necessary medical information to support and/or verify your requested accommodation. By signing below, you grant NAFTA your consent and permission to request the information from your diagnostician for the sole purpose of verifying your requested accommodation for your test administration.
- Candidate information will be kept confidential except as is necessary to verify the accommodation request for the test administration. Your information may be retained only as it applies to your administration of the test. Your records will not be available to persons other than NAFTA staff and administrators necessary to confirm your accommodation. You agree to the normal procedures utilized by NAFTA for the purpose of verifying and providing your request for accommodation.
- It is the policy of NAFTA to notify you of the status of your request by telephone, e-mail, U.S mail, or by any means convenient for the association and/or as requested by you. NAFTA may send you other communications informing you of changes to your accommodation request and new technology that you may find valuable or informative.
- You understand and agree to reasonable inspections of NAFTA's records and review of documents (which may include your Consent Form and supporting documentation) which may be made by government agencies or other organizations in the normal performance of their duties.
- You agree to bring any concerns or complaints regarding any privacy matter to the attention of NAFTA.
 - Your confidential information will not be used for the purposes of marketing or advertising of products, goods or services.
 - NAFTA agrees to provide Candidates with access to their records in accordance with applicable state and federal laws.
 - NAFTA may change, add, delete or modify any of these provisions.
 - You have the right to request restrictions in the use of your protected health information. However, NAFTA is not obligated to alter internal policies to conform to your request.

I, _____ date _____ do hereby consent and acknowledge my agreement to the terms set forth above in the HIPAA CONSENT FORM and any subsequent changes.

Exhibit E-Pass Report GEI



PASSED REPORT GEI

Congratulations! We are pleased to inform you that you passed the Certified Group Exercise Instructor Exam. The required passing score is set at correctly answering 70% of all the scored items within the exam. You may use the title “Certified Group Exercise Instructor” (GEI) while your certification is valid.

A certificate suitable for framing will be mailed to the address we have on record for you within 30 to 45 days of this announcement. Please keep us informed of any address or name changes. Meanwhile, keep this score report for your records. If your certification number and expiration date are needed prior to receipt of your certificate, these will be available for verification through NAFTA at 214-771-6171 Or registration@naftafitness.org

Your certification will be valid for two (2) years and will expire on the date listed on your certificate. The requirements for recertification can be found on NAFTA’s website, in the Certified Group Fitness Exercise Instructor Recertification Handbook.

Congratulations again and NAFTA wishes you success in your professional pursuits!

Exhibit F-Fail Report GEI



FAIL REPORT GEI

We regret to inform you that you did not pass the Certified Group Exercise Instructor Exam (GEI). The minimum required passing score is set at correctly answering 70% of the scored items on the exam. Your overall score was _____%.

The following is a breakdown of your performance in each of the major content areas.

Content Area	Score
Class Delivery	00.0%
Class Design & Planning	00.0%
Principles of Anatomy & Physiology	00.0%
Professional Responsibilities	00.0%

The percentage of scored items you answered correctly in each content area is indicated in the table above. These percentages are provided for information purposes as to how you performed on this administration of the exam. The number of items represented in each content area varies, therefore the reliability of data based on percentages may be insufficient to make meaningful interpretations. As individual content areas are not scored separately, your overall test score cannot be computed from the percentages provided. Those individuals that have failed the exam should not assume that strong performance in a particular content area will automatically occur on a future attempt on the exam. Those individuals considering retaking the exam should study for the whole exam, paying special attention to areas of weakness. To more fully understand your performance within specific areas covered by the exam, refer to the Exam Content Outline provided in the NAFTA GEI Handbook.

Those candidates who do not pass the certification examination for the first time are eligible to retest for the retest fee (Please see GEI Candidate Handbook). NAFTA allows candidates to retest after 90 days of the initial exam date. This provides adequate time for review of the subject matter areas.

If a candidate does not pass after a 2nd attempt, he/she may retest after 60 days from the second test date. This allows time for the candidate to prepare more in depth for the exam and be made aware of any policy and/or exam changes. If a candidate does not pass the exam after three (3) attempts, the candidate will have a 1 year waiting period before further attempts may be made.

Thank you for your interest in NAFTA and the Certified Group Exercise Instructor Exam (GEI). We wish you success in your preparation should you decide to retake the exam!

Exhibit G-Exam Registration Form



NAFTA Group Exercise Instructor Exam Registration Form

First Name _____ Last Name _____

Address _____

City _____ State _____ ZIP Code _____

Personal E-Mail _____ Work Email _____

Cell Phone # _____ Home Phone # _____

CPR/AED Certifying Agency: _____ Exp. Date: ____/____/____

Exam Package Options (check one):

- | | | |
|--|---|----------|
| ☐ GEI EXAM Only - \$199.00 | Initial Exam Y/N _____ Retest Y/N _____ | |
| ☐ Study Companion* – Textbook, study guide, PowerPoint, flash cards, practice exam / Workshop | | \$399.00 |
| ☐ Study Companion* – Textbook, study guide, PowerPoint, flash cards, practice exam / Exam | | \$299.00 |

**Study Companion: I understand that I do not have to order the Study Companion to take the GEI EXAM*

Payment method:

Name on credit card: _____

Credit Card Number: _____ Exp. date ____/____/____ 3 digit security code: _____

I agree to have NAFTA charge my credit card for fees as indicated above and associated with the GEI exam registration. I understand these fees are non-refundable.

Signature _____ Date _____

Next Steps:

1. Set Up Candidate account on NAFTA @ <http://www.naftafitness.org>
2. Email this Registration form, CPR/AED Card, and verification of education to registration@nafta1.net
3. If you require reasonable accommodations, submit the Exam Reasonable Accommodation Request form and required documentation. (Circle One) Yes No

After you have created an account, emailed this form and submitted all required documents, you will receive a confirmation email with a VOUCHER for entrance into the exam.

Your personal voucher along with a government issued picture ID are **required** on the day of the exam – no exceptions.

Exhibit H-NAFTA Certification Exam Candidate Compliance Statement



NAFTA Certification Exam Candidate Compliance Statement

Please fill in the required fields below to be registered for the

Group Exercise Instructor Certification Exam

NAFTA ID# _____

Name: _____

Street Address: _____

City, State, Zip Code: _____

Email Address: _____

Telephone Day () _____

I have read and agreed to abide by NAFTA's examination policies as stated in GEI Candidate Handbook and available for download at www.naftafitness.org

Signed: _____ Date: _____

Exhibit I-NAFTA Recertification Application

NAFTA Recertification Application

The following application is required to recertify all NAFTA certifications. Please complete this form (type or print), include payment for processing, and maintain a copy for your files.

	ONLINE	MAIL/FAX
First Certification		
On-time renewal	\$138	\$138
Additional Certifications: *		
On-time renewal for 2 certifications	\$123.50 each	\$123.50 each
On-time renewal for 3 certifications	\$99 each	\$99 each
On-time renewal for 4 certifications	\$89 each	\$89 each
Expired Certifications		
Up to 3 months late	\$138 each	\$138 each
Over 3 months, up to 6 months late	\$199 each	\$199 each

Recertification policies may be found on the NAFTA website and in the GEI Candidate Handbook. Fees may be subject to change.

Name: _____ Date: _____

Address _____ City _____ State _____ Zip _____

Cell phone () _____ Work Phone () _____

METHOD OF PAYMENT Circle one: Check enclosed Money Order enclosed Credit Card

Credit Card Number: _____ Expiration Date ____ / ____ CVV _____

I agree to have NAFTA charge my credit card for fees as indicated above and associated with this recertification form. I understand these fees are non-refundable.

Signature: _____

Certifications for Renewal:

1) _____ Exp. Date _____ 2) _____ Exp. Date _____

3) _____ Exp. Date _____ 4) _____ Exp. Date _____

Attach another page if submitting more than four recertifications.

NAFTA CEU Sources

NAFTA Workshops (please provide a copy of your certificate)

1) _____ 2) _____
3) _____ 4) _____

Attach another page if you attended more than 4 Workshops

NAFTA Home Study Programs (please list)

1) _____ 2) _____
3) _____ 4) _____

Attach another page if you completed more than 4 home study programs

CPR, AED, First Aid and/or LifeGuard Certification. Please provide a copy of certification.

1) _____ 2) _____

Pre-Approved CEU's other than NAFTA (please list and provide verification)

1) _____ 2) _____
3) _____ 4) _____

Attach another page if needed

NAFTA considers all applicants without regard to race, color, religion, creed, national origin, age, disability, marital or veterans status, sexual orientation, or any other legally protected status.

Be sure to mail in this application with the applicable fees and CEU documentation to:

NAFTA Recertification

16495 N 113th Way

Scottsdale, AZ 85262

Exhibit J -NAFTA Appeal Form

NAFTA Appeal Form

Name: _____ Date: _____

Address _____ City _____ State _____ Zip _____

Cell phone () _____ Work Phone () _____

METHOD OF PAYMENT Circle one: Check enclosed Money Order enclosed Credit Card

Credit Card Number: _____ Expiration Date _____ / _____ CVV _____

I agree to have NAFTA charge my credit card for fees as indicated above and associated with this recertification form. I understand these fees are non-refundable.

Signature: _____

REASON FOR APPEAL Circle one: Exam Results Recertification Eligibility

EXAM RESULTS APPEAL

Any candidate who feels that his or her examination effort was negatively impacted by improper instruction, unprofessional proctoring standards, or unreasonable environmental or other distracters.

- 1) Must report the grievance to the exam proctor immediately.
- 2) The proctor will document the complaint and submit it to Scantron where the complaint will be forwarded to the NAFTA for further investigation.
- 3) Following any examination administration where a candidate feels that his or her examination effort was negatively impacted, NAFTA mandates that candidate also contact NAFTA via phone at 214-771-6167 to report the incident and how it negatively impacted performance within 30 days of the examination.

NAFTA will make an equitable decision based upon the information gathered from all relevant sources, including the candidate, proctors, and Scantron.

RECERTIFICATION APPEAL:

Certifications for Renewal:

- 1) _____ Exp. Date _____
- 2) _____ Exp. Date _____
- 3) Exp. Date _____
- 4) Exp. Date _____

Attach another page if submitting more than four recertifications.

Please check the conditions of appeal from the list below:

- Military duty or deployment which adversely affects access to continuing education courses
- Serious illness or accident, or serious illness or death of an immediate relative that may have adversely affected your ability to obtain CEU's

- Financial hardship
- Professional career demands adversely affecting time or access to continuing education courses

Please explain how this condition impacted your ability to meet recertification deadlines

I certify that the above information is true and accurate as it relates to the recertification of my NAFTA certifications.

Signature _____ Date _____

Package checklist:

☐	Recertification Application
└	Continuing education documents
└	Applicable fees

Mail to:

NAFTA Recertification Dept.
16495 N 113th Way
Scottsdale, Arizona 85262

EXAM RESULTS APPEAL

NAFTA reserves the right to reject any registration application that does not meet the specified eligibility requirements. If a registration application for a NAFTA Certification Exam is not accepted, an individual can appeal and request the application be reviewed again.

The appeal must include:

- 1) A detailed explanation of the reason(s) why the individual believes they should be eligible
- 2) All supporting documentation.
- 3) Submit all eligibility appeals for review via mail, email, or fax to:

NAFTA Credentialing Department
16495 N 113th Way
Scottsdale, AZ 85262

Eligibility appeals will be reviewed and responded to within 10 working days of their receipt. Individuals submitting the appeal will receive notice that their eligibility appeal was either “approved” with instructions for moving forward with exam registration, or “denied” with notification of the reason for the denial. Individuals who have an eligibility appeal denied can submit a new eligibility appeal if they have additional supporting documentation that meets the requirements noted in the denial.

Exhibit K-NAFTA Course/Workshop Petition Form

NAFTA COURSE / WORKSHOP PETITION FORM

If you have attended a course or workshop that is not currently approved for NAFTA CEUs you may petition for approval. Please photocopy this form as needed for multiple petitions.

Certification preparation courses offered by other organizations or providers are not eligible for NAFTA CEUs by petition.

Courses/workshops taken through an accredited college or university do not require petition.

Date _____
Name _____ Email _____
Address _____
City _____ State _____ Zip _____
Phone (cell) _____ (work) _____

Current NAFTA Certification(s) held: _____

☐ 1 petition x \$25.00 = \$25.00 ☐ Each additional petition @ \$10.00 ea. _____

☐ Check ☐ Visa ☐ Mastercard ☐ American Express ☐ Discover ☐ Money Order

Credit Card # _____ Exp. Date _____ / _____ CVV _____

I agree to have NAFTA charge my credit card for fees as indicated above and associated with this course petition. I understand these fees are non-refundable.

Signature _____

Course(s) for petition:

1) _____
course or workshop title *instructor name*
2) _____
course or workshop title *instructor name*
3) _____
course or workshop title *instructor name*
4) _____
course or workshop title *instructor name*

Please submit your payment and the following documentation with this completed form:

- 1) Course/ Workshop Outline
- 2) Instructor Biography
- 3) Instructors name, title, phone number and address. Instructor is required to have a 4 year degree (Bachelor's or higher) in a health/fitness related area.
- 4) Length of the workshop and breakdown of lecture and practical time
- 5) Verification of attendance and completion.

Mail To: NAFTA Recertification 16495 N 113th Way Scottsdale, Arizona 85262

Exhibit L-Proctor Manual, Exam Checklist and Training



Test Proctor Training Manual

Test Administration Policies and Procedures

National Aerobics & Fitness Trainers Association
Scottsdale, AZ 85262

Phone: 214-771-6167

Email:

regsitration@naftafitness.org

Web: www.naftafitness.org

Introduction

About the NAFTA Test Proctor

A NAFTA Test Proctor is an individual volunteering to act on behalf of the NAFTA Certification Program to securely administer the NAFTA Certified Group Fitness Exercise Instructor (GEI) exam to one or more NAFTA Test Candidates. This manual provides the NAFTA Test Proctor (referred to hereafter as “Proctor”) with instructions and training for the security and delivery of the NAFTA GEI exam without incident.

Test administration is a standardized process that requires the Proctor to be compliant with professional standards and expectations of the NAFTA Certification Program. The Proctor must demonstrate an understanding of and adherence to the following:

- Proctor Eligibility
- NAFTA Test Scheduling and Delivery
- Standardized Testing Conditions and Requirements
- Proctor Compliance

About the NAFTA GEI Certification Program

The National Aerobics and Fitness Trainers Association (NAFTA) offers a Certified Group Fitness Exercise Instructor (GEI) credential which is achieved only upon successful completion of the NAFTA GEI exam.

Purpose

NAFTA's mission is to ensure people have access to well-qualified health and fitness professionals, as well as science-based information and resources on safe and effective physical activity, so they may get active, establish healthy behaviors, and live their most fit lives.

NAFTA is an education and training organization for fitness professionals. NAFTA is dedicated to offering certification programs and continuing education that teach concepts and theories of health and fitness. NAFTA's educational programs are optional and are not required to take the certification exam.

NAFTA encourages the professional development and appropriate credentialing of group exercise instructors and further supports the credibility and efforts of the fitness industry. The NAFTA GEI Certification Program identifies individuals with factual and applied knowledge to:

- Design and deliver safe, effective, and motivating programs
- Enhance the health-related benefits of physical activity
- Work with healthy and medically-cleared populations

Description

The NAFTA GEI Certification Program is designed to prepare aspiring group exercise instructors to teach safe and effective classes to apparently healthy and medically-cleared populations. Test candidates who successfully complete the NAFTA GEI program have demonstrated their understanding of fundamental exercise science principles for safe, effective group fitness exercise class design. Only these individuals will receive the NAFTA GEI credential. More details are available

in the NAFTA GEI Candidate Handbook available at <http://www.naftafitness.org/nafta-certified-group-exercise-instructor-exam-content-outline.pdf>.

Test Administration

NAFTA ensures standardized processes for test administration in which each NAFTA Test Candidate is tested using the same criteria and methods. To assure this, NAFTA qualifies each Proctor based on standardized eligibility and approval requirements described herein. All Proctors will follow the same set of training standards and test administration procedures as described in this training manual.

In the case of a special accommodation, and in compliance with the Americans with Disabilities Act (ADA), NAFTA will work with the Test Candidate to seek out an appropriate Proctor. In all cases, the Proctor must be verified by NAFTA as being eligible to serve in the capacity of Proctor. The Proctor must meet all Proctor eligibility requirements, in addition to meeting additional requirements as needed in order to adequately serve the special accommodation.

Paper/Pencil Testing provides no advantage or disadvantage to the NAFTA Test Candidate. The NAFTA Test Form Booklet will be representative of the test content outline specifications and percentages, which are identical to that of the test content outline specifications and percentages used in the event of computer-based testing (CBT) administration.

Proctor Eligibility

NAFTA paper/pencil Proctors are secured by NAFTA directly upon the receipt of appropriate documents and the verification of credentials to support eligibility. All NAFTA Proctors must be pre-qualified and adhere to the policies set forth, which include providing NAFTA Certification with all appropriate documentation and attestation to the understanding of and compliance with administration procedures. NAFTA Certification may deny Proctor eligibility at its sole discretion.

Proctor Approval Requirements

Prior to the approval of any Proctor, NAFTA Certification will require proper documentation and assurance of available communication directly with approved Proctor. The Proctor must indicate and/or provide documentation to support the following:

- Possession of an education-related degree/license OR employment by an approved testing center (Two professional references are required)
- At least 21 years of age
- Dependable access to lines of communication and delivery channels
 - Physical address for Federal Express delivery and availability to sign for package
 - Accessible phone number with available voicemail
 - Working email that is checked regularly
- Proficiency in the English language
- NO conflict of interest (e.g.: familial relationship or otherwise whereby he/she benefits from the successful outcome of the Test Candidates' test scores)
- Review of and intent to adhere to the requirements set forth in this manual

After an individual has served as a NAFTA Proctor, he/she is prohibited from taking the NAFTA GEI exam until which time a subsequent NAFTA Test Form has been developed. Any individual who is delivering or assisting in the delivery of NAFTA GEI related educational material, in a manner whereby preparatory instruction is provided to the Test Candidate, will be disqualified to act as a NAFTA Proctor for the NAFTA GEI exam.

Submitting Proctor Documents to NAFTA Certification

NAFTA Proctors enter into agreement whereby the Proctor is entitled to administer the NAFTA GEI exam at an authorized facility in accordance with all requirements and regulations documented in this *Test Proctor Training Manual*. For review and approval by NAFTA Certification, Proctor candidates must submit supporting documentation as follows:

1. **Test Proctor Application** (APPENDIX A)
 - a. Contact information, to include home shipping address
 - b. Employment Information
 - c. Signature indicating thorough review and understanding of the terms of this agreement
2. **Proctor Non-Disclosure Agreement** (APPENDIX B) - A legally binding agreement which assures that NAFTA GEI test materials are handled with the utmost care, security and confidentiality and that no conflict of interest is present. NAFTA takes test security and delivery very seriously and will protect itself and its certified professionals from all threats or actual breaches thereof.
3. **Qualification Document(s)** - Certification requires the submission of one or more professional documents to establish and verify your qualification as NAFTA Proctor. This must include at least one of the following:
 - a. Teaching license/credential/degree
 - b. Employment verification/reference from appropriate testing facility/education department supervisor
 - c. Direct reference from a testing center which confirms the Proctor's willingness to appropriately administer the NAFTA GEI test via paper/pencil

These instructions and respective downloads are also available at [<http://www.naftafitness.org>]. You may submit all documentation directly from this NAFTA website location or send to:

Email: registration@naftafitness.org

Mail: NAFTA Human Resources Dept
16495 N 113th Scottsdale, AZ 85262

You will be provided with Proctor approval or denial status and/or a request for additional supporting documentation by phone or email within 4 business days of the receipt of documentation. NAFTA Certification may deny eligibility at its sole discretion.

Paper/Pencil Proctor Compensation

Proctors will be compensated per the table below:

NAFTA Test Candidates	Number of Proctors	Compensation
1-15	1	\$100.00
15-29	1	\$150.00

Updates to Information

The information in this manual, related documents, facility and administration requirements, and/or proctor submission requirements are subject to change/revision at any time and without notice. The most current version of this *NAFTA Proctor Training Manual* can be reviewed and/or downloaded at [<http://www.naftafitness.org/nafta-proctor-training-manual.pdf>].

NAFTA Test Scheduling and Delivery

NAFTA paper/pencil exams are scheduled upon request by an approved paper/pencil Proctor. You must be approved to administer the NAFTA exam before it will be scheduled for delivery. You may submit a test request at the same time that you submit your proctor documents, but note that NAFTA Certification requires a 20 business day notice of a test date. Therefore, make sure to allow sufficient time for an approval status in addition to the time needed for test delivery (approx. 30 or more business days).

If you do not make a test request at the time of your proctor documents submission, and you have been approved to administer the exam as a NAFTA Proctor, you will have 30 days to make a test request before your Proctor status is inactive and resubmission of documents is required.

NAFTA will confirm your Test Proctor status and schedule the Test Form Booklet for delivery **upon approval and verification of:**

- Test candidate(s) eligibility status
- Test Proctor approval status, based on:
 - o Submission of all proctor documents
 - o Signed Proctor Non-Disclosure Agreement
 - o Test Request for test date with 20 or more business days notice

The NAFTA GEI exam will be delivered via Federal Express to the approved Proctor directly (signature required), NAFTA will send only to the Test Proctor's home address to assure that the test candidate does not have access to the Test Form Booklet at any time before the test date. Access by any third party who represents a conflict of interest is prohibited.

The exam(s) must be administered on the test date that was provided to NAFTA Certification in the initial request, unless an extension or a request to reschedule has been approved by NAFTA Certification directly.

Test Form Booklet(s) and all accompanying documents **MUST** be returned via Federal Express by the Proctor him/herself, with no exceptions. Return shipping instructions are provided.

Rescheduling: NAFTA test candidates may reschedule the test without any penalty, only if contact is made with NAFTA 5 days prior to the scheduled test date. If the exam has already been delivered to the Proctor, it is required of the Proctor to return the unopened test booklet(s) within 24 hours of cancellation notice; unless arrangements have been made directly by and between NAFTA Certification and the Proctor, in writing (i.e. by email.)

Administration of Paper/Pencil NAFTA GEI Exam

When setting up for administration of the NAFTA GEI exam, there is a step-by-step procedure to which the approved Proctor must adhere to assure that the exam is delivered correctly and with a valid test score outcome.

Establishing the Test Date

A mutually convenient test date and time must be established between the Proctor and the Test Candidate that allows for a notice of at least twenty (20) business days to NAFTA Certification staff. The test date must be requested to NAFTA Certification staff directly by the Proctor, not the Test Candidate. The Proctor must provide name(s) and identifying information for Test Candidate(s) at the time of test request. This includes: name(s) and NAFTA ID# OR address of Candidate(s) being tested.

Upon approval of Proctor status and an established test date/request, NAFTA will order the paper/pencil exam(s) for delivery. NAFTA paper/pencil testing vendor is Assessment Systems (AS). NAFTA Certification is responsible for printing the test forms from the appropriate AS software and the shipping and tracking all NAFTA paper/pencil exams to the Proctor. NAFTA Certification is also responsible for uploading completed paper/pencil exams to the appropriate AS software for scoring. NAFTA uses Federal Express for Test Form Booklet delivery and return receipt. NAFTA Proctors are required to follow the receiving/handling/return instructions for Federal Express shipments of Test Form Booklets.

Delivery and Handling of NAFTA GEI Exam(s)

NAFTA will schedule the exam(s) for delivery via Federal Express so that arrival is approximately two (2) days prior to the actual test date. Instructions for delivery confirmation will be included. The Proctor must immediately, by email or fax, notify NAFTA of receipt of all test documents as instructed. Instructions for receipt confirmation will be provided inside the Test Form Booklet shipment. Test Proctor must inspect the Test Form Booklet(s) to ensure that the condition of the booklets is satisfactory and intact. Test Form Booklet shipments will contain the following:

- Test Form Booklet(s) and Answer Sheet(s)
- Packing List/Shipment Receipt Confirmation – *MUST BE COMPLETED WHEN PACKAGE IS RECEIVED*
- Discrepancy Form – report any discrepancy in the shipment/receipt of test material (if applicable/if discrepancy exists)
- Seating Chart - provided only when receiving two or more exams
- Test Site Report/Incident Reporting Form – complete this document if a perceived incident has occurred, to ensure accurate recording of administration details
- Test Instruction Forms (1) and (2) – accountability instructions “FOR PROCTOR” and “FOR TEST CANDIDATE”
- Return Federal Express Shipping Label and Envelope/Box

At all times, before and after test administration, NAFTA exam(s) must be secured personally by the Proctor in a secure location. NAFTA exam(s) must be protected from damage, misplacement, theft, and conditions that might reveal test content. Test(s) must be kept secure, locked safely in a secure environment, that assures test content and test candidate confidentiality and validated test scoring and processing.

DUPLICATION OR MISAPPROPRIATION OF ANY NAFTA EXAM IS NOT PERMITTED – a violation of this type will be considered a breach of the Proctor Non-Disclosure Agreement. The Proctor may be pursued for legal recourse and the NAFTA Test Candidate(s) score(s) will be investigated and cancelled at NAFTA's discretion in accordance with *Codes of Conduct and Disciplinary Policy* (found at [<http://www.naftafitness.org/nafta-codes-of-conduct-policy.pdf>].)

Exam Administration

NAFTA exam(s) must be proctored on the approved test date and in accordance with *Standardized Testing Conditions and Requirements* (starting on page 7). The Proctor must verify the test candidate's identity by referencing the test candidate's driver's license, state identification, or other form of picture ID prior to the administration of the exam in accordance with *Standardized Testing Conditions and Requirements* (starting on page 7).

Returning the NAFTA GEI Exam(s)

Upon conclusion of test administration, the Proctor collects the NAFTA GEI exam(s) and assures that all test booklet(s), answer sheet(s), seating chart (if applicable), and Test Site Report/Incident Reporting Form (if applicable) are placed inside the Federal Express return envelope and sealed for return delivery. Using the return Federal Express shipping label and envelope/box provided, the Proctor will return the sealed test package to Federal Express **within 24 hours** of test administration.

When the test form is not being used by the test candidate during actual test administration, NAFTA Test Form Booklet(s) must be handled by the Proctor only. The Proctor must personally delivery the test package to Federal Express.

Standardized Testing Conditions and Requirements

Test Room Pre-Check

NAFTA test sites must adhere to the following standards for test administration environment/facility. The Proctor must be present for the entire duration of test administration with no exceptions. The Proctor must assure the following as part of the test room pre-check:

- The room is quiet, well lit, and well ventilated and is at a comfortable temperature
- Test workstation must have adequate desk space, providing room for the test booklet and arm space
- Test Candidate must be provided with chair/seat that ensures a reasonable level of comfort
- Test Candidates must be seated at least 4 feet apart from other Test Candidates, or by partitions, if applicable, when testing more than one test candidate (seating chart is required in this case)
- No material related to the exam, other than the test forms, are in the room (the NAFTA GEI exam is a closed book exam)

Proctor Conduct Requirements

NAFTA expects its Proctors to behave in an appropriate and professional manner. The following guidelines should be followed when proctoring the NAFTA GEI exam:

- Wear appropriate dress, such as business casual or professional casual athleticwear.
- Arrive at the test facility site at least 30 minutes before the scheduled exam time to perform the test site room precheck prior to the arrival of the Test Candidate(s).
- Assure an exact two (2) hour test administration time duration.
- Use appropriate language (e.g.: no cursing, offensive, and/or sexually charged language.)
- Use appropriate mannerisms and non-verbal communication.

Supplies and Materials

The Proctor must designate a secure area away from the Test Candidate where his/her belongings may be stored during the test. The Proctor will provide the Test Candidate with the following supplies and materials to be used during the exam:

- Test form, answer sheet, and scratch paper
- Envelope for returning all test material
- Number 2 pencil, required
- *Test Instruction Form (2)* – **APPENDIX D**

Test Candidate Responsibilities

NAFTA informs all Test Candidates of their responsibility to assist in the assurance of proper test administration. The Proctor acts to ensure that Test Candidates:

- Arrive on time for test appointment.
- Provide government-issued photo ID.
- Do not access personal items or printed material (i.e.: handbags, PDAs, cell phones, books, notes, dictionaries, jewelry, sunglasses, etc.)
- Do not assist others. This includes but is not limited to: the impersonation of another test candidate, sharing information of any kind, and giving or receiving advice or other help. The consequences for cheating or copying test materials could include financial responsibility for any test materials compromised.
- Do not disturb or distract others in any way through the test process
- Fill in all bubbles on answer sheet for identifying the test candidate and respective test form using a #2 pencil

Test Security and Handling Instructions

Proper procedures for test security and handling must be strictly followed to assure the validity of test scores. To accomplish this, NAFTA has implemented the following procedures:

- The Proctor must reference each Test Candidate's government-issued photo ID to verify and confirm identity.
 - The name on the photo ID must match the name of the person registered to sit for the exam exactly. Exceptions to this will be made on a case-by-case basis if the

- candidate is able to provide sufficient supporting documentation regarding any differences between the name on the registration roster and the name on the ID.
 - NAFTA will notify the Proctor of any approved exceptions prior to the test date.
- The Proctor must provide each Test Candidate with all supplies and materials for the exam and provide an area away from the Test Candidate for him/her to store any personal items.
- The exam may not be reproduced or recalled in any manner. The consequences for copying test materials could include financial responsibility for any test materials compromised.
- Test content must NOT be viewed by the Test Candidate or the Proctor prior to the confirmed test date.
- The Proctor must remain in the room with the Test Candidate(s) at all times during test administration, and the Test Candidate(s) must be strictly monitored.
- The maximum ratio of 1 Proctor per 15 Test Candidates should not be exceeded.
- If a Proctor observes a Test Candidate using aids, looking on another Test Candidate's work, or exhibiting any other suspicious behavior, the behavior must be documented immediately following the exam on the *Test Site Report* (APPENDIX E), which will be included in the Test Form Booklet package and should be returned with the exam. The Proctor is NOT required to confront the Test Candidate with the incident.
- The Proctor is not to give advice and/or consultation during the exam. He/She may not imply or in any way provide the Test Candidate with what is believed to be the test question(s) and/or answer(s).
- Test Candidates are not allowed to leave the examination room at any time other than during scheduled breaks, if any. The Proctor may make an exception if he/she determines that it is reasonably necessary only under specific conditions which include:
 - Only one (1) Test Candidate may be excused from the examination room at a time.
 - The Test Candidate must not reference written materials, use electronic devices, or engage in conversation while outside the examination room.
 - The time for taking the test must not be extended or altered in any way.
 - Any other conditions the proctor deems necessary to ensure the integrity and security of the test administration.
 - The incident must be documented on the *Test Site Report* (APPENDIX E), which will be included in the Test Form Booklet package and should be returned with the exam.
- The Proctor is required to provide a 30-minute, 15-minute, and 5-minute warning as the end of the test time allotment approaches.
- The Proctor must receive the test booklet directly from each Test Candidate upon completion of the test administration and immediately place the exam(s) and answer sheet(s) in the designated envelope/box to be sealed and returned to NAFTA via Federal Express. The Proctor may not review the exam(s) or answer sheet(s) prior to returning them to NAFTA, other than to ensure that all are present and accounted for.
- Proctor must handle the test form booklet(s) personally and not provide this or any related documents to any unauthorized faculty or staff member for return delivery handling.
- Test Form Booklet(s) must be personally delivered by proctor to Federal Express within 24 hours of test administration.
- In the event that the scheduled exam is cancelled or a re-schedule is required, the test materials are to be returned immediately to NAFTA, per Federal Express return delivery

instructions (unless express written consent has been given to the Proctor to hold the Test Form Booklet(s) for an alternative test date).

Special Situations and Emergencies

The safety and welfare of people are the top priority in the event of an emergency. In the event of a medical emergency, the emergency phone number (911 in the US) must be called. CPR, AED, First Aid, or other appropriate procedures should be administered by an appropriately trained individual onsite until professional help arrives.

In the event of a power outage, the candidate must stop taking the exam and leave the test room. Upon determining the cause of the outage and/or time frame for return of power, it may be mutually agreed upon between Test Candidate and Proctor for continued test administration.

Proper fire exits must be made available to the Test Candidate(s) in accordance to related state fire safety codes and procedures. If an emergency evacuation is required, the Proctor must instruct the Test Candidate(s) to leave the test room and not use study material, or discuss test content with other Candidates (when applicable), during the evacuation. No materials may be removed from the test site location.

The exam may be resumed after a satisfactory conclusion to any emergency situation. The Proctor must inform all Candidates that the time lost will be added to the test administration time. The Proctor must accurately track lost time.

Equal Opportunity & the American Disability Act

NAFTA fully supports the principles of equal opportunity and complies with the American Disability Act (ADA). As such, NAFTA requires the following:

- Proctors and their test facilities must be free from barriers which restrict facility access and test progression.
- Proctors, facilities, and related administration personnel must be free from discriminatory practices regarding gender, race, age, creed, etc.
- Proctors and facilities must meet all health and safety requirements.

To learn more about compliance with American Disability Act (ADA), visit <https://www.ada.gov/>.

Confidentiality

The Proctor will maintain confidentiality of all NAFTA professional documents, including, but not limited to, Test Candidate information, all test content, and related documentation.

NAFTA will maintain the confidentiality of all documents and conversations pertaining to Proctors' personal contact information and test incident reports, unless otherwise informed and permitted by the Proctor or if such disclosures are required by law. In addition, NAFTA will maintain the confidentiality of Test Candidates' certification test scores.

Proctor Compliance

All policy, procedure, and instructional requirements, as set forth in this *NAFTA Proctor Training Manual*, must be followed to assure professional test administration and valid test score processing. By complying with the test administration procedures set forth by NAFTA, Proctors help to ensure the following:

- Standardization, safety, and professionalism of testing conditions
- Security of Test Candidate's information and NAFTA test information
- Integrity of the NAFTA exam
- Reputability of the NAFTA Certification in the industry

Reports of Suspected Non-Compliance

A Proctor or facility who fails to follow test administration procedures will be considered non-compliant. The following are three main areas in which Proctors and facilities may be suspected of non-compliance:

- Facility, test environment, or location
- Proctor codes of conduct
- Test handling, test administration, or return delivery

NAFTA empowers and encourages Test Candidates to report perceptions of non-compliance. Test Candidates are provided with a document before the exam is administered, *Test Sitting Instructions and Responsibilities* (APPENDIX D), which allows them to review the policies for test administration and document any violations, which may include distractions, improper Proctor behavior, or site issues/barriers.

NAFTA also encourages Proctors to report perceptions of facility non-compliance. Likewise, facility personnel are encouraged to report perceptions of Proctor non-compliance.

NAFTA reserves the right to observe the Proctor and/or facility during test administration at its discretion and may perform random observations to ensure that the Proctor and/or the facility is adhering to the policies and procedures in this manual and following all test delivery processes correctly. These random observations may be conducted with or without notice. The Proctor must be available during the duration of an observation and will receive an *Audit and Observation Form* (APPENDIX F) after the observation concludes.

Proctor & Facility Audits

If a Proctor and/or facility is suspected to be non-compliant, NAFTA may schedule an audit or conduct an audit without notice, depending on the nature of the concern. The Proctor must be available during the duration of an audit and will receive an *Audit and Observation Form* (APPENDIX F) after the audit concludes. If NAFTA finds that a violation of policies and procedures has occurred, the Proctor and/or facility will be asked to correct the oversight within a specific timeframe, which will be determined by NAFTA.

Failure to correct the oversight within the specified time frame, violations found to be serious, or repeat offenses may result in Proctor status revocation, notification to appropriate licensing

board(s), and/or legal filings and proceedings. The degree by which a Proctor is non-compliant will be determined at NAFTA's sole discretion.

Proctor & Facility Appeals

Proctors and facilities who receive a notice of non-compliance have the option to appeal the decision. To do so, the affected Proctor or facility must submit a written request for an appeal to NAFTA within 30 days of receiving the notice. Appeals process details are available upon request.

- Phone: 214-771-6167
- Email: registration@naftafitness.org

Training Conclusion

Congratulations, you have now completed your NAFTA Proctor training. To complete the process of becoming a Proctor for the NAFTA GEI exam, please be sure to complete and/or submit the following:

- A thorough review and understanding of the policies and procedures in this manual
- Proctor Application (APPENDIX A)
- Proctor Non-Disclosure Agreement (APPENDIX B)
- Qualification Documents

Applicants will be provided with Proctor approval or denial status and/or a request for additional supporting documentation within 7 business days of NAFTA's receipt of the application. Thank you for your interest in serving as a Proctor for the NAFTA GEI exam.

NAFTA Headquarters

16495 N 113th Way

Scottsdale, AZ 85262

Email: registration@naftafitness.org

NOTE: Print clearly and legibly. Incomplete forms will NOT be processed.

APPLICANT INFORMATION

NAME (Last, First, Middle): _____

DOB: _____ SSN: _____ ENGLISH PROFICIENCY: ☐ YES ☐ NO

HOME ADDRESS: _____

CITY: _____ STATE/PROVIDENCE: _____ ZIP CODE: _____

CURRENT EMPLOYER: _____

WORK ADDRESS: _____

CITY: _____ STATE/PROVIDENCE: _____ ZIP CODE: _____

PRIMARY PHONE: _____ PRIMARY EMAIL: _____

Check the boxes below to attest access to dependable lines of communication & delivery channels.

- Physical address for Federal Express delivery and availability to sign for package
(CHECK ONLY ONE BOX BASED ON PREFERENCE FOR DELIVERY)
 - ☐ I can receive/sign for packages at my home address.
 - ☐ I can receive/sign for packages at my work address.
- Accessible phone number with available voicemail
 - ☐ My primary phone has working voicemail.
- Working email that is checked regularly
 - ☐ My primary email works and is checked regularly.

PROCTOR TRAINING AGREEMENT

As indicated by my signature, I have read and intend to follow the policies and procedures as described in the *NAFTA Proctor Training Manual*. I understand my role as a Proctor; that it is my responsibility to ensure proper management, security, and delivery of the NAFTA GEI Exam in accordance with the training that I have received; and the consequences for non-compliance. I attest that the information I have provided NAFTA is true and accurate to the best of my knowledge.

x _____
(signature) (date)

Mail: NAFTA Headquarters – 16495 N 113th Way, Scottsdale, AZ 85262

Questions? Call 214-771-6167

PROCTOR NON-DISCLOSURE AGREEMENT

APPENDIX B

I acknowledge, understand, affirm, and agree without exception to the following:

- Based on representations I have made, I am being afforded access to NAFTA's confidential and/or proprietary information, as well as NAFTA exam information and content which is confidential, copyrighted, and is considered to be a Trade Secret.
- I will not disclose or provide such information in any form to any person or entity, directly or indirectly.
- Reproducing, copying, or attempting to reproduce or copy any test material by any means, in whole or in part, is a serious breach of examination security and will be thoroughly investigated by NAFTA and reported to the proper certifying and law enforcement authorities.
- I may be individually and personally financially responsible for any test materials compromised by my failure to adhere to the NAFTA policies, procedures, security protocols, etc. as described in the *NAFTA Proctor Training Manual* (e.g.: investigation costs, attorney fees, court costs, exam re-development costs, etc.)

I understand and agree to abide by all established NAFTA Test Administration Policies and Procedures, Test Administration Directives, Security Protocols, etc. I certify and affirm the following:

1. I am of good moral character, and as such, I have not been the subject of any judicial or administrative decisions involving offenses or violations of moral turpitude (e.g.: fraud, larceny, deceit, etc.)
2. I am the person identified herein, and all the information provided, or which will be provided, is true and correct to the best of my knowledge.
3. I have been fully informed and am aware of the responsibilities, duties, expectations, and requirements to become and remain an authorized NAFTA Proctor. As such, I understand and agree that it is my direct and personal responsibility to:
 - a) Read, comprehend and adhere to all the Proctor responsibilities and requirements as set forth within NAFTA's most current Exam Delivery Manual prior to administering any exam(s).
 - b) Maintain the security and confidentiality of all NAFTA exams, exam content, exam questions and options, etc. at all times before, during, and after exam administrations.
 - c) Refrain from providing any training, instruction, classes, or engaging in any activity which, directly or indirectly, is focused on assisting any candidate achieving a passing score on the NAFTA exam.
 - d) Refrain from reading any exam questions or discussing the content of any exam(s) administered with anyone other than an individual specifically authorized by NAFTA.
 - e) Stay informed and be knowledgeable of all NAFTA test administration policies and procedures, security protocols, and requirements, etc. published and updated by NAFTA, which are posted to the Proctor section of NAFTA's website.
 - f) Comply with all procedures relating to the handling and reporting of any breach of test security and/or potential examination compromise.
 - g) Accurately check each Test Candidate's government issued photo identification.
 - h) Refrain from offering or providing any hints, suggestions, definitions, or clues to the answer of any exam question.

- i) Refrain from proctoring, or having any involvement with, any exam administered to any individual to whom I am related, have or have had a relationship with, am friends with, have direct or indirect supervisory authority over, etc.
- j) Without exception, immediately inform NAFTA in writing of any instances where I am arrested or charged with any criminal act and will provide NAFTA with the facts and circumstances surrounding any such arrest(s) or criminal charge(s).
- k) Actively monitor Test Candidates during the exam administration for the purpose of ensuring the security of the exam being administered, as well as ensure that the Test Candidates:
 - i. Do not talk or communicate with one another or any outside party during the test administration.
 - ii. Do not have access to any items and materials, other than those specifically listed within the authorized materials section.
 - iii. Do not bring or use a cell phone, pager, camera, or recording device of any kind into the test room.
 - iv. Do not have possession of any personal items, such as paper, pens, notes, dictionaries, iPods, Blackberries, laptops, Bluetooth ear pieces, wristwatches, cameras, during the test administration.
 - v. Do not copy, by hand or electronically, any examination material.
 - vi. Sign the NAFTA candidate roster prior to taking the test.

4. I will, without reservation, cooperate with any investigation deemed appropriate and necessary by NAFTA by making myself available upon request, providing any requested information and/or documents, truthfully and fully answering questions, etc.

5. I understand that this Agreement shall be construed in accordance with the laws of the State of Arizona and agree to submit to the jurisdiction of the courts of the State of Arizona with respect to any disputes relating thereto.

I, the herein identified and below signed individual, hereby acknowledge understanding and agreement with regard to the following:

- My responsibilities as a Proctor, authorized to deliver confidential and secure NAFTA client exams, are critical to the maintaining the security and credibility of NAFTA examinations.
- All NAFTA and NAFTA's Client business practices, documents, test questions or confidential information received from NAFTA shall remain the exclusive property of NAFTA and shall be returned immediately upon request to NAFTA.
- Breach of this agreement (whether intentional, unintentional, through negligence, by error, and/or by omission) may be grounds for civil proceedings should NAFTA pursue legal remedies relating to any such exam security breach and/or examination content breach.
- Failure to follow the standards set forth by the **NAFTA Exam Delivery Manual** and related protocols, may result in my privilege as a Proctor being revoked, and I may be individually and personally responsible for any such failure.

By signing below, I acknowledge that I have read this agreement, understand the information contained herein and will abide by provisions as stated within this document, as well as other written exam delivery policies and procedures maintained by NAFTA.

I hereby certify that the statements contained herein are true and correct to the best of my knowledge and belief. I understand that if I knowingly make any false statements herein I am subject up to and including revocation of my NAFTA Certification, as well as other penalties as may be prescribed by law.

PROCTOR Printed Name: _____

PROCTOR Signature: _____

DATE SIGNED: _____

WITNESS Printed Name: _____

WITNESS Signature: _____

WITNESS ADDRESS: _____

Mail: NAFTA Headquarters – 16495 N 113th Way, Scottsdale, AZ 85262

Questions? Call 214-771-6167.

FOR TEST PROCTOR

Please carefully review the following to ensure successful test administration:
(for complete Proctor Training Manual: [<http://www.naftafitness.org/nafta-proctor-training-manual.pdf>].

1. Review Shipment Contents

Immediately, upon receipt of test materials, test booklets must be inspected to ensure that the condition of the test booklets are satisfactory and intact. Your shipment will contain the following:

- **Test Booklets and Answer Sheets**
- **Packing List/Shipment Receipt Confirmation – *MUST BE COMPLETED WHEN PACKAGE IS RECEIVED***
- **Discrepancy Form** – report any discrepancy in the shipment/receipt of test material, if needed
- **Seating Chart** (provided only when receiving two or more tests)
- **Test Site Report/Incident Reporting** – please complete to ensure accurate recording of test details
- **Test Instruction Forms (1) and (2)** – accountability instructions “**FOR PROCTOR**” and “**FOR TEST CANDIDATE**”
- **Return Federal Express Shipping Label and Envelope/Box**

2. Confirm Receipt of Test Material

After verifying that the test booklet number(s) corresponds to the *Packing List* “**CONTENTS**”, fill out the section of this form marked “Shipment Receipt Confirmation” and fax the form to NAFTA Certification at 480-393-1707. ***In the event that there is a discrepancy between materials actually received and that of the Packing List “CONTENTS”, complete the “Discrepancy Form” and fax it to NAFTA Certification at 480-393-1707.***

3. Return All Test Material (must be returned within 24 hours of test date)

NAFTA exams must remain secure at all times! After completion of the exam, all materials should be returned to NAFTA **no later than the first working day** after the test date. Test booklet(s), answer sheet(s), Test Site Report, and Seating Chart (if applicable) should be placed in the return package. Complete the Federal Express return label, affix to the package and drop off at your local Federal Express location (or call **1-800-GOFEDEX** to arrange for Federal Express pickup).

A lost, or otherwise non-recovered, exam constitutes an administrative breach and may result in the termination of your proctor status and possible further investigation. PLEASE CAREFULLY HANDLE AND IMMEDIATELY RETURN TEST MATERIAL.

4. Test Date Cancellations or Reschedules

If the scheduled exam is cancelled or a reschedule* is required, the exam materials are to be returned to NAFTA within 48 hours of the initial test date unless otherwise instructed. **ALL SHIPMENT CONTENTS MUST BE RETURNED.** Complete the Federal Express return label, affix to the package, and drop off at your local Federal Express location (or call **1-800-GOFEDEX** to arrange for Federal Express pick-up).

*If a reschedule can occur within **one week** of initial test date, call NAFTA at 214-771-6167 prior to returning the test material.

FOR TEST CANDIDATE
Required reading for Proctor and Test Candidate

NAFTA reserves the right to cancel test scores and require a Test Candidate to reschedule, retake, or may otherwise revoke future test eligibility if incidents occur or observations are made which are in violation of one or more of the following (not a comprehensive list):

- Test Candidates should be monitored throughout the entire duration of exam administration.
- Test Candidates may not have access to personal items (e.g.: handbags, PDAs, cellphones, books, notes, dictionaries, etc.) during the NAFTA exam administration.
- No assisting others through the impersonation of another Test Candidate, sharing information of any kind, giving or receiving advice or other help, etc.
- Test Candidates must be seated at least 4 feet apart from all other Test Candidates. The enclosed seating chart must be used and returned by the Proctor when testing more than one Candidate.
- No disturbing or distracting others in any way through the test process.
- Test Candidates must properly bubble in score sheets with #2 pencil, including Name, Test Booklet ID#, Test Code#, Test Form# (found from the test booklet), and all answers. If not, there will be at least a two-week delay in receiving results and an administrative fee will be assessed in the amount of \$25 to the Test Candidate.
- Test candidates with similar or identical response string data may lose Test Candidate eligibility status. Identical response string incidents are reported to NAFTA when all answers (right and wrong) are marked the same by two or more Test Candidates. Identical response strings are statistically and mathematically improbable; therefore, a retest or test eligibility revocation will occur.

Please report below any violations which may have occurred during test administration, including but not limited to: distractions, improper proctor behavior, or facility issues/barriers. Please use additional pages as needed and submit the report to NAFTA via mail or fax, as indicated below.

- **Mail: NAFTA Headquarters – 16495 113th Way, Scottsdale, AZ 85262**

THANK YOU

EXAMINATION SITE REPORT

APPENDIX E

TEST SITE REPORT

Test Date: _____ Test Location: _____

Proctor Name: _____ Number of Candidates Tested: _____

Start Time: _____ Finish Time: _____

Site Comments (optional): _____

Signature of Proctor: _____ Date: _____

Incident Reporting

If you feel that a test administration breach has occurred, please explain on the form below. (Use additional pages if needed.)

Name of Candidate(s) involved: _____

Description of Incident: _____

Proctor Signature: _____ Date: _____

AUDIT & OBSERVATION FORM**APPENDIX F**

If a Proctor and/or facility is suspected to be non-compliant, NAFTA may schedule an audit or conduct an audit without notice, depending on the nature of the concern. The purpose of an audit is to investigate suspicions of non-compliance and to determine appropriate corrective measures. The Proctor must be available for the duration of an on-site audit.

Additionally, NAFTA reserves the right to observe the Proctor and/or facility during test administration at its discretion and may perform random observations. These random observations may be conducted with or without notice. The purpose of an observation is to ensure that the Proctor is adhering to the policies and procedures in the *NAFTA Proctor Training Manual* and is following all test delivery processes correctly. The Proctor must be available for the duration of an on-site observation.

Auditor/Observer's Name: _____

Auditor/Observer's Position with NAFTA: _____

Name of Proctor being Audited/Observed: _____

Purpose (circle one): Audit Observation

If a suspected violation has occurred, provide a brief explanation below*:

--

**Please use additional sheets if necessary.*

Proctor Approval Requirements:

Possession of Approved Degree/License OR Qualifying Employment	Two (2) References Provided	Easily Accessible through Open Lines of Communication	Information is Current and Accurate	NO Conflict of Interest

AUDIT & OBSERVATION FORM**APPENDIX F****Standardized Testing Conditions:**

Test Room Pre-Check	Proctor Conduct Requirements	Supplies & Materials	Test Candidate Responsibilities

Standardized Testing Conditions (Cont.):

Test Handling & Security	Special Situations & Emergencies	Equal Opportunity & the American Disability Act	Confidentiality

This audit and observation form is for NAFTA's internal use. The Proctor will receive a copy of appropriate audit and observation forms and all relevant documents. If NAFTA finds that a violation of policies and procedures has occurred, the Proctor and/or facility will be asked to correct the oversight within a specific timeframe, which will be determined by NAFTA.

Failure to correct the oversight within the specified time frame, violations found to be serious, or repeat offenses may result in Proctor status revocation, notification to appropriate licensing board(s), and/or legal filings and proceedings. The degree by which a Proctor is non-compliant will be determined at NAFTA's sole discretion.



PROCTOR APPLICATION AND AGREEMENT

NOTE: This agreement must be **fully completed and executed**, by ALL individuals authorized to act in the capacity of an authorized Proctor for National Aerobics and Fitness Trainers Association (NAFTA.) Print clearly and legibly. Incomplete forms will not be processed!

PROCTOR BIOGRAPHICAL INFORMATION

Last Name: _____
First Name: _____
Middle Name: _____
D.O.B.: _____ S.S.N./ID #: _____
Residential Address: _____
City: _____ State/Province: _____
Postal Code: _____ Home/Cell Phone #: _____
Work E-Mail: _____
Personal E-Mail: _____
Country Citizenship: () USA () Other, specify: _____

EMPLOYMENT INFORMATION

Current Employer: _____
Employer Address: _____
City: _____ State/Province: _____
Postal Code: _____ Work Phone #: _____
Position: _____ Duties: _____
Start Date: _____

UNDERSTANDING AND AGREEMENT

By signing below, I hereby acknowledge, understand, affirm and agree to the following, without exception, that based on representations made, I am being afforded access to confidential, proprietary, and Trade Secret Information and that I will not disclose or provide such information in whole or part to anyone directly or indirectly. Further, I understand that reproducing, copying, or attempting to reproduce or copy any examination (test) material by any means, in whole or in part, is a serious breach of examination security and will be thoroughly investigated by NAFTA and reported to the proper certifying and law enforcement authorities.

I also fully understand and agree that, should I fail to adhere to published NAFTA policies, procedures, and security protocols, etc., I am, and agree to be, individually and personally financially responsible for any examination materials compromised, as well as for all other costs associated with such security breach and/or examination content compromise to include, but not limited to, investigation costs, attorney fees, court costs, etc.

My signature below reflects my understanding and willingness to abide by all established NAFTA Test Administration Policies and Procedures, Test Administration Directives, Security Protocols, etc., in addition to the below specified:

Duties and Responsibilities

1. I hereby CERTIFY and AFFIRM that I am of Good Moral Character, as such I have not been the subject of any judicial or administrative decisions involving offenses or violations of moral turpitude, among which includes Fraud, Larceny, deceit, etc.
2. I hereby CERTIFY and AFFIRM that I am the person identified herein and all of the information provided or which will be provided is true and correct.
3. I have been fully informed, and am aware of my responsibility, duties, expectations and requirements to become and remain an authorized NAFTA Certified Proctor. As such, I understand and agree that it is my direct and personal responsibility to:
 - a) Read, comprehend and adhere to all of the proctor responsibilities and requirements as set forth within NAFTA's most current Exam Delivery Manual prior to administering any examination(s)/test(s).
 - b) I agree to maintain the security and confidentiality of any NAFTA examination(s), exam content, exam questions and options, etc. at all times before, during and after exam administration(s).
 - c) I do not provide any training, instruction, classes, or am engaged in any activity which directly or indirectly is focused on assisting any candidate achieving a passing score on the NAFTA examination.
 - d) I am not permitted to read any exam questions, or discuss the content of any examination(s) administered with anyone, other than an individual specifically authorized by NAFTA.

e) It is my responsibility to keep informed and be knowledgeable of all NAFTA test administration policies and procedures, Test Administration Directives, security protocols and requirements, etc. published and updated by NAFTA. I also acknowledge that I am aware that such policies and procedures, protocols, etc. are published and posted to the Proctor section of NAFTA's website.

f) I will comply with all procedures relating to the handling and reporting of any breach of test security and/or potential examination compromise.

g) I will accurately check each candidate's government issued photo identification in addition to ensuring that other candidate eligibility testing requirements are adhered to as indicated within the NAFTA testing system for each examination administered.

h) I will not offer or provide any hints, suggestions, definitions, or clues to the answer of any examination question.

i) I will not proctor, or have any involvement with any examination administered to any individual to whom I am related, have or had a relationship with, are friends with, have direct or indirect supervisory authority over, etc.

j) I will, without exception, immediately inform NAFTA in writing of any instances where I am arrested or charged with any criminal act. Further, I will provide NAFTA with the facts and circumstances surrounding any such arrest or criminal charge(s).

k) I will actively monitor the candidate(s) during the exam delivery (administration) to ensure the security of the examination being administered, as well as to ensure that the candidate(s) are:

i. Not talking or communicating with one another or any outside party during the course of the test administration.

ii. Candidate(s) does not have access to any items and materials, other than those specifically listed within the authorized materials section.

iii. Ensure that the candidate does not bring or use a cell phone, pager, camera, or recording device of any kind into the test room.

iv. Ensure that the candidate does not bring in, or is in **POSSESSION** of any equipment/resources into the testing room such as paper, pens, notes, dictionaries, iPod's, Blackberries, lap-tops, Bluetooth ear pieces, wristwatch, camera, or any other electronic devices, etc. during the test administration.

v. Ensure that no one shall copy, by hand or electronically, any examination material.

vi. Ensure that each candidate signs their name on the NAFTA candidate roster prior to permitting them to test.

4. I will, without reservation, cooperate with any investigation deemed appropriate and necessary by NAFTA. Further, I agree to cooperate with any such investigation by making myself available upon request, providing any requested information and/or documents and by truthfully and fully answering questions.

5. Governing Law. This Agreement shall be construed in accordance with the laws of the State of Arizona and the parties agree to submit to the jurisdiction of the courts of the State of Arizona with respect to any disputes relating thereto.

NON-DISCLOSURE AND CONFIDENTIALITY

I, the herein identified and below signed individual, hereby acknowledge and agree that, as an NAFTA Certified Proctor authorized to deliver confidential and secure NAFTA client examinations, I understand my responsibilities as a Proctor are critical to the security and maintaining the credibility of NAFTA client secure examinations. Further, I am aware, I am being afforded access to both NAFTA confidential and/or proprietary information, as well as examination information and content which is confidential, copyrighted, and is considered to be a Trade Secret. As such, I hereby agree and state that I will not disclose or provide to any person or entity, directly or indirectly, any such information in any form pertaining to examination content, test administration practices, the preparation, testing and/or grading services provided by NAFTA or its affiliates.

I understand that all NAFTA and NAFTA's Client business practices, documents, test questions, or confidential information received from NAFTA shall remain the exclusive property of NAFTA and shall be returned immediately upon request to NAFTA.

I understand that breach of this agreement, intentional, unintentional, through negligence, by error, and/or omission, may be grounds for civil proceedings should NAFTA pursue legal remedies relating to any such exam security breach and/or examination content breach. Minimally, I understand that should I fail to follow the standards set forth by the NAFTA Exam Delivery Manual and related protocols, my privilege as a Proctor will be revoked and I am individually and personally responsible for any such failure.

By signing below, I acknowledge that I have read this agreement, understand the information contained herein and will abide by provisions as stated within this document, as well as other written exam delivery policies and procedures maintained by NAFTA.

I hereby certify that the statements contained herein are true and correct to the best of my knowledge and belief. I understand that if I knowingly make any false statements herein I am subject up to and including revocation of my NAFTA Certification, as well as other penalties as may be prescribed by law.

Proctor Signature

Date Signed

Witness Signature

Witness Full Name Printed

Witness Address

Exhibit M-Confidentiality Agreement

NATIONAL AEROBICS AND FITNESS TRAINERS ASSOCIATION **Confidentiality Agreement**

Confidentiality is a basic element of the operation of NAFTA. To protect the confidentiality of fellow employees and the organization, no confidential information concerning other employees or NAFTA business is to be discussed with anyone except when necessary for the purpose of daily business.

Confidentiality and Non-Disclosure Policy

The purpose of the following Examination Confidentiality and Non-Disclosure Policy is to establish and explain the rules by which NAFTA's BOD will strictly limit, control, and protect all confidential, private, and/or proprietary information concerning certification examinations and the certification process, as well as other materials so designated by NAFTA's BOD. The nature of NAFTA's business and the economic well-being of the organization are dependent upon protecting and maintaining all designated confidential information.

All NAFTA operations, methods, materials, documents, procedures, and proceedings relating to certification tests and examinations (NAFTA test information) are considered private, confidential, and proprietary information by NAFTA's BOD. All NAFTA certification test information is to remain secure and confidential.

Persons Covered By The Policy/Agreements To Abide By The Policy Terms

The receipt and use of NAFTA test information and materials is limited strictly to authorized NAFTA Board Directors, employees, agents, volunteers, contractors, and representatives. All persons identified in this policy must agree to abide by, and comply with, this Policy and all Policy requirements in writing. Each NAFTA Board Director, employee, agent, volunteer, contractor, and representative may be subject to discipline or other sanction by NAFTA due to a violation or attempted breach of any portion of this Policy. NAFTA reserves the right to enforce this Policy by any and all appropriate and legal means.

In addition to other obligations, all NAFTA Board Directors, employees, agents, volunteers, contractors, and other authorized representatives will be bound by all the provisions of this Policy during the course of their employment or association with NAFTA, and will continue to be bound by such provisions after termination of their employment or association with organization.

The obligation to adhere to, and be bound by, the Policy is one that continues beyond the association or employment of representatives, staff, and agents of NAFTA.

Information and Materials Protected

Test information and materials covered and protected by this Policy include, but is not in any way limited to: candidate application status; certification examination questions and answers; examination scores; individual or group performance information; general or specific data regarding test questions, reviews, changes, modifications; and, all other information and materials related to the content, development, and administration of NAFTA certification examinations.

Exhibit M NAFTA Conflict of Interest and Confidentiality Agreement cont.

In addition, any information relating to NAFTA certification examination materials, composition techniques, structure, methods and other similar areas is also proprietary, private, and strictly confidential and will not be released without specific, prior, and written authorization from NAFTA's BOD, including, but in no way limited to, specific information which identifies, or makes possible the identification of, a particular person or candidate.

Furthermore, the identities of the Video Practice Examiners will not be released by NAFTA to candidates or third parties.

All personnel, including subject matter experts, independent consultants and vendors, with access to confidential test items, shall not be eligible for the exam, or eligible to prepare or deliver any preparation course or materials. Any personnel, including subject matter experts, independent consultants and vendors, with access to confidential test items are not eligible for the exam until which time a subsequent test form has been developed and is implemented and by which said personnel have no association.

Information and material which falls outside the protection of this Policy is limited to the following:

- Information which is in the public domain or available as a matter of public record;
- Information specifically authorized to be disclosed by the candidate pursuant to an original, signed authorization of release by that candidate; and,

Information which a NAFTA representative is obligated to produce pursuant to a valid and lawful court or government order, following prior, written approval of NAFTA's BOD, and NAFTA Legal Counsel.

Director, Officer, staff, donor and/or other constituent information may be kept strictly confidential. Only those authorized individuals directly responsible for services to the constituent member shall discuss or have access to this information. Care shall be exercised to be certain that unauthorized individuals do not overhear discussion of confidential information.

Employees and Directors of NAFTA understand and agree that during their employment and/or service they may obtain information and documents that are confidential and/or privileged and proprietary in nature and which must be kept confidential both during and after their term of employment or service. As such, all employees and Directors are required to return any such documents containing privileged or confidential information at the time of the termination of employment or expiration of service, as requested.

Any employee or Director that divulges confidential or privileged information, whether during or after his or her term of employment or service, is subject to appropriate discipline, including dismissal, or other criminal sanctions. Employees and Directors recognize that NAFTA has a proprietary interest in any such information and/or documents and may be irreparably damaged as a result of any disclosure or dissemination thereof. Breaches of confidential information are subject to disciplinary action up to and including immediate termination and/or removal.

Exhibit M NAFTA Conflict of Interest and Confidentiality Agreement cont.

Conflict of Interest Agreement

The purpose of the conflict-of-interest policy is to protect NAFTA's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an Officer or Director of the organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Definitions

Interested Person

Any Director or Officer of the BOD, who has a direct or indirect financial interest, as defined below, is an interested person.

Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- ❖ An ownership or investment interest in any entity with which NAFTA has a transaction or arrangement.
- ❖ A compensation arrangement with NAFTA or with any entity or individual with which NAFTA has a transaction or arrangement.
- ❖ A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which NAFTA is negotiating a transaction or arrangement.
- ❖ Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.
- ❖ A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the BOD decides that a conflict of interest exists.

Procedures

Duty To Disclose

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the BOD considering the proposed transaction or arrangement.

Determining Whether a Conflict of Interest Exists

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he or she shall leave the BOD meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Directors shall decide if a conflict of interest exists.

Procedures for Addressing the Conflict of Interest

An interested person may make a presentation at the BOD meeting, but after the presentation, he or she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

Exhibit M NAFTA Conflict of Interest and Confidentiality Agreement cont.

The Chair of the BOD, if appropriate, may appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

After exercising due diligence, the BOD shall determine whether NAFTA can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the BOD shall determine by a majority vote of the disinterested Directors whether the transaction or arrangement is in the organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

Violations of the Conflicts-of-Interest Policy

If the BOD has reasonable cause to believe a constituent member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

If, after hearing the member's response and after making further investigation as warranted by the circumstances, the BOD determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Records of Proceedings

The minutes of the BOD and all committees with board-delegated powers shall contain:

The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the BOD decision as to whether a conflict of interest in fact existed

The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings

Compensation

A voting member of the BOD who receives compensation, directly or indirectly, from the organization for services is precluded from voting on matters pertaining to that Director's compensation.

A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the organization for services is precluded from voting on matters pertaining to that member's compensation.

No voting member of the BOD whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Annual Statements

Each Director or Officer of the BOD shall sign a statement, upon the beginning of his or her term that affirms such person:

- ❖ Has received a copy of the conflict-of-interest policy.
- ❖ Has read and understands the policy.
- ❖ Has agreed to comply with the policy.

Additionally, from the time they complete their assignment they must wait 2 years before they may work on any preparation materials related to the exam.

Understands the organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

Periodic Reviews

To ensure the organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's-length bargaining.

Whether partnerships, joint ventures, and arrangements with management organizations conform to the organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or in an excess benefit transaction

Use of Outside Experts

When conducting the periodic reviews, the organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the BOD of its responsibility for ensuring periodic reviews are conducted.

I agree and accept the above Confidentiality Agreement & Conflict of Interest Agreement:

Accepted and Signed: _____ Date: _____