



Professional Development (PD) Specialists™ **PROCEDURES MANUAL**

THIRD EDITION

Revised August 2018



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The information contained in this manual is confidential for the use of CDA Professional Development Specialists™ while under contract with the Council for Professional Recognition (“Council”). You may not share the manual with anyone or use it for any other purposes unless approved by the Council. Inappropriate use of this manual will be grounds for contract termination.

CDA Professional Development (PD) Specialists™ Procedures Manual - Third Edition

Available online for download

August 2018

How to Use the CDA Professional Development (PD) Specialist™ Procedures Manual

This manual is designed to be used by Child Development Associate® (CDA) Professional Development (PD) Specialists™ conducting candidate CDA Verification Visits™. It outlines procedures CDA PD Specialists™ need to follow while performing CDA Verification Visits™ for the Council of Professional Recognition (“Council”). In addition, it provides guidelines that govern the CDA PD Specialist’s™ relationship with the Council itself.

This manual serves as a reference guide for the procedures and regulations that govern how to properly conduct the CDA Verification Visit™ and operate as a CDA PD Specialist™. This manual is to be used in conjunction with the Council’s ***Child Development Associate® national credentialing program and CDA® Competency Standards book***. The CDA PD Specialist™ is expected to be familiar with eligibility requirements and data collection responsibilities of the CDA® candidate.

The CDA PD Specialist’s™ role requires keeping abreast of current policies and procedures to maintain professional awareness and knowledge through all Council communication. These mediums include but are not limited to the Council website, the *CounciLINK* newsletter, CDA PD Specialist™ training, *PDS Portal Resource Library*, CDA PD Specialist™ LinkedIn group, and participation in Council webinars, group chats and workshops whenever possible.

CDA PD Specialists™ will be notified of procedural changes through regular updates of this manual. The *CDA PD Specialists™ Procedures Manual* may be printed and contained in a loose-leaf binder. An electronic copy will also be available in the *PDS Portal Resource Library*, and it is the CDA PD Specialist’s™ responsibility to maintain an updated copy of the procedures manual.

This procedures manual has been organized to clarify which procedures are **absolute requirements** to be followed at all times and which are guidelines to assist CDA PD Specialists™ in making their own judgments. ***There can be no deviation from requirements without the prior approval of the Council.***

If there are any questions about these procedures, CDA PD Specialists™ should contact the PDS Team at 800-424-4310 for guidance.

The CDA Professional Development (PD) Specialist™ Verification Visit Process*

Please use this handy process guide for conducting your CDA Verification Visit™ with CDA® candidates.

BEFORE THE CDA VERIFICATION VISIT™

1. The candidate selects you as a possible CDA PD Specialist™ for their CDA Verification Visit™. **You will receive an inquiry email from the candidate.**
 - Respond to the candidate whether or not you can serve as their CDA PD Specialist™ **within 24-48 hours.**
 - If you agree to serve as the CDA PD Specialist™, you will need to provide the candidate your CDA PD Specialist™ ID number for their CDA® application.
2. **You will receive a confirmation email from the Council that the candidate has selected you as their CDA PD Specialist™ in their online application.**
 - Respond to the Council's email acknowledging your willingness to serve as the candidate's CDA PD Specialist™ **within 48 hours.**

***** DO NOT SCHEDULE THE CDA VERIFICATION VISIT™ *****

The candidate completes the CDA® application and submits payment.

The Council processes application and payment, and approves application.

READY TO SCHEDULE

1. The candidate receives a *Ready to Schedule* (R2S) notice. **The candidate will appear in your online Scoring Tool.** The candidate will have up to six months from appearing in your *Scoring Tool* to complete the CDA Verification Visit™ and CDA® Exam.
2. **Contact the candidate and schedule the CDA Verification Visit™.**
 - a. **Conduct the Pre-Verification Visit Checklist interview.** Confirm the candidate's name, setting, language, completion of the *Professional Portfolio*, and directions to the child care center or home.
 - b. **Confirm that the candidate has the correct CDA® Competency Standards book** and that the candidate has an original book, not a copy.
 - c. **Verify the candidate's information in the PDS Portal.** Confirm that the information provided by the candidate corresponds with the information in your *Scoring Tool*. If you find any discrepancies, contact the PDS Team via email and

wait to receive confirmation that the issue has been resolved prior to completing the CDA Verification Visit™.

3. **Contact the candidate's supervisor or director.** Thank him or her for supporting the candidate and answer any questions they may have. Confirm the date and time of the visit and private space availability to review the portfolio and conduct the reflective dialogue.

CDA VERIFICATION VISIT™

1. Arrive at the program on time, introduce yourself, check candidate's ID, and meet supervisor.
2. Obtain candidate's *Professional Portfolio* and CDA® *Competency Standards* book for the appropriate setting.
3. Begin R.O.R. Model®*
 - a. Review (**1 hour**) in private room
 - b. Observe (**2 hours**) in candidate's setting with children as the **lead teacher**
 - c. Reflect (**1 hour**) in private room
4. End visit and return candidate's *Professional Portfolio* and CDA® *Competency Standards* book. Keep the *Comprehensive Scoring Instrument* (CSI). Do not share scores with the candidate or supervisor.


During the visit, you must maintain confidentiality and security of all assessment materials at all times. You may not complete more than two CDA Verification Visits™ in a single day. You may not complete more than three CDA Verification Visits™ in one week.

AFTER THE CDA VERIFICATION VISIT™

1. Submit the candidate's CSI scores using the online *Scoring Tool* within **48 business hours** or before the candidate's six-month expiration date to complete the CDA Verification Visit™, whichever comes first.
2. Keep the original CSI scores and the *Pre-Verification Visit Checklist* for **six months**.

* This process guide is for CDA PD Specialists™ conducting CDA Verification Visits™ for Family Child Care, Infant and Toddler, and Preschool CDA® candidates. **Home Visitor CDA PD Specialists™**, please visit the **Home Visitor Process Guide** on page 26.

NOTE: All CDA Professional Development Specialists™ are required to screen candidates using the *Pre-Verification Visit Checklist* form AFTER the candidate appears in your *Scoring Tool*.

 CDA PD Specialist™ Pre-Verification Visit Checklist			
Please retain for <u>six months</u> from the time of CDA Verification Visit™.			
<p>Prior to the CDA Verification Visit™, the CDA Professional Development Specialist™ must use this Pre-Verification Checklist when contacting the CDA candidate to screen and record the required documentation.</p> <p>This checklist helps to ensure the success of the CDA Verification Visit™, the candidate's proper preparation and ultimately the success of the credentialing process.</p> <ul style="list-style-type: none"> Check your Scoring Tool for the candidate's name FIRST before you schedule the Verification Visit. Verify the information below with the candidate's information in your Scoring Tool. 			
Candidate Name:			
Candidate Phone Number:			
Date Ready to Schedule Notice was received:			
CDA Verification Visit™ City/State:			
Program Name:			
Program Address:			
Program Phone Numbers:			
Director's Name:			
Ages of children enrolled in class/group/home:			
Setting Type:	Preschool (Green) __ Infant/Toddler (Yellow) __ Family Child Care (Blue) __ Home Visitor (Purple) __. (Verify the setting with the color of the candidate's Competency Standards Book. Contact the PDS teacher if the candidate does not have the Competency Standards book matching his/her setting.)		
Language of Assessment (if applicable)	Bilingual (English and Spanish) ____ Other Bilingual (English and ____) Monolingual Spanish ____ Monolingual ____ (Please indicate other language)		
Verify that the candidate will be in the <u>Lead Teacher</u> Role during the CDA Verification Visit™			
Required Items		A check mark indicates that the candidate confirms an understanding of these items required for the VV.	
1. Candidate's Picture ID (Note: verify when you arrive)			
2. Competency Standards book: (Note: Remind them to bring an ORIGINAL COPY on the day of the CDA Verification Visit™)			
3. Professional Portfolio (Note: Remind them to bring on the day of the CDA Verification Visit™) Please ensure that the candidate has the following Professional Portfolio contents: Current First Aid & Infant CPR; Documentation verifying completion of 120 hours of formal education; My CDA Professional Portfolio Checklist; Family Questionnaires Summary Sheet; Reflective Dialogue Worksheet with "Areas of Strength" and "Areas of Growth" completed. [For Home Visitors only: Assessor's Recommendation; Parent Observation Form]			
CDA Verification Visit™ Schedule	(R)evue Date & Time:	(O)bservation Date & Time:	(R)eflection Date & Time:

Please see pages 42 to copy the full version of the Pre-Verification Visit Checklist.

Important Information

Council Website	www.cdacouncil.org
PDS Team Email	pds@cdacouncil.org
Phone Number	800-424-4310
Fax Number	202-265-9161
Mailing Address	Council for Professional Recognition 2460 16th Street NW Washington, DC 20009
PDS LinkedIn Group	https://www.linkedin.com/groups/8308690
Facebook	https://www.facebook.com/cdacouncil
Twitter	https://twitter.com/cdacouncil
PDS Portal Link	http://www.cdacouncil.org/pds-login
CounciLINK Newsletter	http://www.cdacouncil.org/newsletter

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Dear CDA Professional Development Specialist™,

WELCOME!

We are so glad to welcome you to the CDA Professional Development (PD) Specialist™ community! We are very appreciative of your talent, expertise, and your commitment to leadership and professional development. Now, more than ever, as our profession grows and changes in today's world, early childhood education continues to be an exciting area in which to work, study, and lead.

Your role as a CDA PD Specialist™ is to bring your early childhood education (ECE) expertise to assess candidates' competencies to obtain their Child Development Associate® (CDA) Credential™.

We value your hard work and dedication with the Council. You are truly a critical component to the "Best 1st Step" for early educators. It is an honor to work with you as we continue to enhance the credential's effectiveness and relevancy.

Sincerely,



Valora Washington, Ph.D.
CEO

Council for Professional Recognition

Introduction

About the Council for Professional Recognition

Mission of the Council

The Council for Professional Recognition promotes improved performance and recognition of professionals in the early childhood education of children from birth to five years old.

Vision of the Council

The Council works to ensure that all professional early childhood educators and caregivers meet the developmental, emotional, and educational needs of our nation's youngest children.

Child Development Associate® (CDA) National Credentialing Program

In keeping with our goal to meet the growing needs for qualified early child care and education staff, the Council administers the Child Development Associate® (CDA) National Credentialing Program. The CDA® program is designed to assess and credential early childhood education professionals.

The Council recognizes and credentials professionals who work in all types of early care and education programs including infant-toddler, preschool, family child care, and home visitor. The CDA® is a nationally recognized credential program based on standards of competence interpreted in a particular child care setting. Early childhood educators earn the credential working with children between birth and five years of age in child care centers and family child care homes around the world. Candidate evaluation occurs through a competency-based professional development assessment process facilitated by the CDA Professional Development (PD) Specialist™.

The Council sets policies and procedures for assessment and credentialing, publishes the *CDA® Competency Standards* books and other materials used for CDA® credentialing, and administers the assessment.

The CDA Professional Development (PD) Specialist™ System

The integrity of the Child Development Associate® (CDA) assessment system in large part rests on individuals like you that are trained and endorsed as CDA Professional Development (PD) Specialists™. A CDA PD Specialist™ is a critical quality control factor in the CDA® assessment system. It is essential that consistency and quality occur during each and every assessment you do to maintain the reliability, validity, and credibility of the CDA® assessment system.

Reliability means consistency. For the CDA® assessment system to be reliable, every assessment must follow the same process. Consistency is necessary to guarantee that fair treatment occurs during each assessment, thus preserving the integrity of the national credentialing process. This manual, the forms, and other related materials you use for your assessments are the tools that ensure the same procedures are followed during each and every CDA Verification Visit™.

Validity is a principle well-grounded upon evidence. The CDA PD Specialist™ system is the Council's dedicated program focused on developing, supporting, and maintaining a network of qualified early childhood professionals serving the CDA® candidates. The evidence you collect for the CDA® assessment system is designed to distinguish competent candidates from those who are in need of more training. This is based on candidates meeting the competency criteria established in the *CDA® Competency Standards* books.

The Review-Observe-Reflect™ (R.O.R.) Model® is necessary for you to facilitate the CDA® assessment of a candidate through self-reflection and professional growth during the CDA Verification Visit™. By using the R.O.R. Model®, you are expected to deliver professional development experiences to candidates by incorporating coaching skills, early childhood education expertise, and cultural sensitivity.

The CDA® credentialing process is not only an assessment but also a series of professional hands-on developmental experiences. This process is the **“Best 1st Step”** for early childhood education teachers as they embark on their career paths.

The Role of the CDA Professional Development (PD) Specialist™

As a CDA PD Specialist™ and an early childhood professional, you are trained, contracted, and endorsed by the Council to utilize your expertise in early childhood education to facilitate the final stages of the credentialing process for candidates within your local communities.

You have the knowledge and the know-how to support the professional development of early childhood care and educational professionals. Furthermore, by being a CDA PD Specialist™, you are recognized as an excellent resource and facilitator of the credentialing process.

As part of your role as a CDA PD Specialist™, you will review and verify for the candidate the procedures and documents required to complete the CDA® assessment system. You are charged to use this manual conscientiously as a resource to perform your responsibilities as a CDA PD Specialist™. It is critical that you always conduct CDA Verification Visits™ in a professional manner that preserves and builds the integrity of the CDA® assessment system.

The CDA PD Specialists™ are expected to:

1. Prepare for each CDA Verification Visit™ by following training and contractual agreements, and by using:
 - a. The *Pre-Verification Visit Checklist*;
 - b. The candidate's correct setting and *CDA® Competency Standards* book;
 - c. The *CDA PD Specialist™ Procedures Manual* and *Resource Library*; and
 - d. The PDS Team as needed
2. Conduct the candidate's CDA Verification Visit™ using the R.O.R. Model® within one day, unless a situation arises that requires you to use the 7-day assessment window.
3. Access the *PDS Portal* to submit individual candidate scores within 48 hours of the CDA Verification Visit™.
4. Agree to keep all information in the *PDS Portal* current.
5. Respond to CDA PD Specialist™ related inquiries from candidates and the Council by email and/or phone within 48 hours.
6. Participate in CDA PD Specialist™ training and continuing education for professional development to increase knowledge and skills related to early care and education best practices.

Please see the *CDA PD Specialist™ Standards of Practice* on page 36.

CDA PD Specialist™ Ethical Principles

Because CDA® candidates are credentialed by the Council, the early childhood education community holds CDA PD Specialists™ in high esteem. Therefore, the Council expects you as CDA PD Specialists™ to perform with a conscientious effort that exemplifies the highest ethical standards.

Principle I: Ethical Conduct Amongst Candidates

As the CDA PD Specialist™, you have a personal responsibility to demonstrate characteristics that will help candidates take responsibility for their own actions and choices. As a CDA PD Specialist™ and professional early childhood educator, you will lead by example in the following ways:

- Treat each candidate considerately and justly when clarifying issues according to the Council's *CDA PD Specialist™ Procedures Manual*.

- Avoid intentionally exposing a candidate to disparagement.
- Manifest a positive mentoring role in the candidate's assessment.
- Maintain confidential information concerning candidates.
- Submit facts without distortion, bias, or personal prejudice.
- Respect a candidate's freedom of choice.
- By not steering candidates for your financial gain.

Principle II: Ethical Conduct for Practices and Performance

You will always assume the responsibility and accountability of your performance and continually strive to exhibit the competence of a CDA PD Specialist™. You will endeavor to maintain the dignity of the position by respecting and abiding by Council policies, and by showing personal integrity. The following list of practices will ensure your ethical conduct at all times:

- Agree and accept candidate assessments on the basis of professional qualifications.
- Be truthful in providing your professional qualifications and avoid misrepresentations.
- Continue to grow professionally by receiving training and education when opportunities arise.
- Comply with program policies, applicable community laws, and regulations that are not in conflict with the Council's ethical expectations.
- Adhere to the official policies of the Council.
- Account for all pre-authorized expenditures for specific candidate assessments.

Principle III: Ethical Conduct Towards Professional Colleagues

In exemplifying ethical relations with colleagues, you agree to treat all members and early childhood educators equitably and with fairness. As a CDA PD Specialist™ and professional early childhood educator, you will:

- Maintain confidential information concerning colleagues and candidates.
- Refrain from willfully making false statements about colleagues and candidates.
- Understand that your role is not to evaluate the program or agency during CDA Verification Visits™.

Principle IV: Ethical Conduct Towards Program and Community

As a CDA PD Specialist™ and professional early childhood educator, you will:

- Make concerted efforts to communicate to the candidate all information needed to support the candidate's completion of the assessment process.
- Contact the candidate's program director or supervisor to inform them about the upcoming candidate's CDA Verification Visit™. You should also show appreciation towards the director for supporting the candidate and answering any general questions related to the CDA Verification Visit™.

- Strive to understand and respect the values, traditions, and religious beliefs of the diverse cultures represented in the program and in the candidate's classroom.
- You are also expected to comply with local, state, federal and/or national laws, in addition to Council policies.

Determining Conflicts of Interests

Although you may meet all of the general eligibility requirements to become a CDA PD Specialist™, there are times when a conflict of interest may occur. It is your duty to discuss with the candidate any possible ethical conflicts of interests and decide accordingly. Outlined below are specific relationships that disqualify you from serving as a CDA PD Specialist™ for a candidate:

You may NOT serve as a candidate's CDA PD Specialist™ if:

- You are the candidate's relative.
- You are the candidate's current direct supervisor.
- You are the candidate's former direct supervisor within the past 3 years.
- You are the candidate's co-worker in same group or classroom.
- You have a child in the candidate's class or group.
- You have served as the candidate's CDA PD Specialist™ for another CDA® credential.
- You have served as the candidate's CDA PD Specialist™ and the candidate is re-applying for the same credential.

If a CDA PD Specialist™ is in any of these types of relationships with the candidate, the CDA PD Specialist™ may not, under any circumstances, accept the assignment.

Additional Ethical Considerations

During the CDA Verification Visit™, you must remain unprejudiced, and have an unbiased perspective on the candidate's efforts to obtain the CDA® Credential. You, more so than the Council, know about the particular local situation. The Council relies primarily on the CDA PD Specialist's™ judgment and capability to bring an independent perspective.

There are many other types of relationships requiring both the candidate and the CDA PD Specialist™ to consider **carefully** when determining potential ethical conflicts.

Situations that require ethical consideration by both the candidate and the CDA PD Specialist™ are when the CDA PD Specialist™ or candidate is:

- An indirect supervisor
- A trainer, either indirect or direct
- Any person or representative of an organization that has financial/contractual considerations related to the candidate or may benefit in any way from the candidate's credentialing outcome

- The candidate is the employer
- A co-employee in the same facility, not in the same group/classroom
- Any person who may have a personal or professional bias toward or against the candidate, or any group of which the candidate is a part (such as peer/friend/foe)
- A licensing agent

The Council discourages any CDA PD Specialist™ with a relationship that may fall in **one or more** of the categories in the list above from conducting the CDA Verification Visit™. The Council reserves the right to take further action and reject/return the candidate's application at any time should a question of conflict of interest arise. As standard practice, all CDA PD Specialists™ and candidates are required to sign a *Statement of Ethics*.

Before the CDA Verification Visit™

In order for you to begin your role as a CDA PD Specialist™, you must have a few items ready for the CDA® candidate, namely your CDA PD Specialist™ identification number and online profile in the *PDS Portal*.

CDA PD Specialist™ Identification Number

After you have completed your training as a CDA PD Specialist™, you are assigned a unique identification number beginning with the capital letter “P” followed by eight numerals (i.e., P22374547). You must provide your complete ID number to each candidate as it is a requirement to complete the CDA® application.

CDA PD Specialist™ (PDS) Profile

You will be required to maintain and update your CDA PD Specialist™ profile on the *PDS Portal*. The profile contains specific information that includes your contact information, professional skills, expertise, spoken languages, and setting specialization. Your profile in the *PDS Portal* links directly to the profile card within the online *Find-a-PD Specialist Online Directory*. You may access the *PDS Portal* anytime to update your profile, or select your opt-in or opt-out options for the online directory. You may also upload a headshot photo of yourself (similar to a passport photo) to the profile.

There is a section on the PDS profile for you to complete a short professional statement about yourself. This statement will be seen on the profile card within the *Find-a-PD Specialist Online Directory*. Since there is limited space to write your professional statement, it is important to highlight just those critical facts that candidates should know when making their selection(s) to choose a CDA PD Specialist™. Consider including in your statement such things as a current background check, fluent foreign language skills, specialized knowledge, and talents, etc. These kinds of factors will help the candidate determine the best CDA PD Specialist™ for them to choose in their local community.

We never display the last name of CDA PD Specialists™ in the online directory so that your identity is protected. However, once you are selected as a CDA PD Specialist™ for a candidate, your contact information, as well as the candidate's is shared between the two parties.

Each CDA PD Specialist™ shall edit the content of their profile. Important updates such as name changes and new addresses must be shared directly with the PDS Team. Please email changes to pds@cdacouncil.org.

Candidate Contact

Your role as a CDA PD Specialist™ begins with the initial contact by the candidate to you and your agreement to serve as the candidate's CDA PD Specialist™. During this time, you will have specific responsibilities as detailed below.

1.1 Availability

You must keep the Council informed about your availability to conduct CDA Verification Visits™ and maintain your contact information in the *PDS Portal* online profile. There are no guarantees that your services will be selected by a candidate, but you are encouraged to market yourself within your local community in areas such as local community colleges, universities, and resource and referral agencies.

1.2 CDA® Candidate Selection of a CDA PD Specialist™

A candidate makes a selection for a CDA PD Specialist™ to conduct their CDA Verification Visit™ in the following ways:

- When the candidate personally asks the CDA PD Specialist™ to serve as his/her specialist. In this case, you will provide the candidate with your CDA PD Specialist™ identification number for him/her to include in their application.
- The candidate will utilize the *Find-a-PD Specialist Online Directory* to send an email request to check the availability of a local CDA PD Specialist™. You are expected to contact the candidate as soon as possible, **but no later than 48 hours from the time the email is received**. If you are selected by the candidate, you will receive a confirmation email.
- The candidate will ask the PDS Team for assistance in locating a CDA PD Specialist™. The PDS Team will then reach out to a CDA PD Specialist™ to determine availability. If you receive a request, please respond to the PDS Team promptly, but no later than 48-72 hours from the time of receiving the email request.

An email request from the PDS Team will be sent to you to notify you of the candidate's request for you to serve as his/her CDA PD Specialist™. **Please note: this is not the Ready to Schedule notice.** This notice is only to confirm that a candidate has sent a request; it does not authorize the CDA PD Specialist™ to do anything other than contact the candidate for discussion.

1.3 Declining a CDA Verification Visit™

When a candidate makes a request via email, you must let the candidate know as soon as possible, but no later than **48 hours** from the time of the email if you accept or decline the request. It is considered a professional courtesy to send the candidate a response even if you are unable to accept the candidate's request. This courtesy allows the candidate sufficient time to find another CDA PD Specialist™.

Ready to Schedule

When the candidate's application processes successfully, a *Ready to Schedule* (R2S) notice appears in the candidate's online application. **If you are the selected CDA PD Specialist™, you will see the candidate's name in your Scoring Tool in the PDS Portal. At this point, you are authorized to schedule the CDA Verification Visit™.** It is also an indication that the candidate can take the CDA® Exam at a local Pearson VUE Testing Center. The candidate will have six months to complete both the CDA Verification Visit™ and the CDA® Exam from the moment the candidate's name appears in your *Scoring Tool*. **There are no extensions to this rule.** The CDA® Exam can be completed either before or after the CDA Verification Visit™. As a courtesy, please remind the candidate that he/she must complete their CDA® Exam and CDA Verification Visit™ within this six-month window.

Screening Conversation with Candidates

As the selected CDA PD Specialist™ for the candidate's CDA Verification Visit™, you must contact him/her by telephone within 48 hours of seeing the candidate's name in your *Scoring Tool* to conduct the *Pre-Verification Visit Checklist*. Your contact with the candidate has several important purposes:

- To establish a positive relationship
- To verify that the candidate understands his/her responsibilities
- To confirm the candidate's setting type and language
- To confirm the candidate has completed all assessment requirements for the chosen setting and is ready for the CDA Verification Visit™
- To clarify what the R.O.R. Model® will entail, and
- To reiterate that the role of the CDA PD Specialist™ ends after the CDA Verification Visit™ scores are entered into the system

2.1 Pre-Verification Checklist

Using the *Pre-Verification Visit Checklist*, located in the *PDS Portal Resource Library*, you will document the specifics of the candidate's assessment and ensure proper preparation for the CDA Verification Visit™. Ask each of the questions listed on the *Pre-Verification Visit Checklist* and check off the appropriate line when gathering the information.

- **Verify the candidate's setting** -- Ask the candidate the color of the *CDA® Competency Standards* book used to prepare for the assessment. Center-Based-Preschool (**GREEN**), Center-Based-Infant/Toddler (**YELLOW**), Family Child Care (**BLUE**) or Home Visitor (**PURPLE**).
- **Verify the candidate's work setting and/or age group** (Preschool, Infant/Toddler, Family Child Care or Home Visitor).
- Ask how old the children were in the group when the candidate compiled the *Professional Portfolio*.
- **For bilingual assessments, only Council endorsed bilingual CDA PD Specialists™ may conduct these CDA Verification Visits™.** You must check for bilingual specialization requirements in the *CDA® Competency Standards* book, *Part 1, Language Specializations*. While speaking with the candidate, check to see if the candidate understands and can communicate effectively in both English and the other language. The CDA PD Specialist™ may ask the candidate “*Can you speak, read, and write both English and Spanish or the other language well enough to understand and be understood by others?*” Also engage the candidate in conversation to elicit verbal responses in both languages. If the candidate is unable to communicate in both languages, call the PDS Team at the Council for assistance, once you finish the conversation.
- Confirm the schedule for the CDA Verification Visit™ date, start time, length of each step of the R.O.R. Model®, and location.

It is important to put the candidate at ease right from the start. This process is accomplished by making it clear that there is total transparency during the entire assessment. You should explain, in detail, your role during the CDA Verification Visit™ and why. Also, explain that all information shared during the evaluation is kept confidential.

Conducting this advance screening will allow you to discover any issues and prepare resolutions prior to traveling to the assessment site. **It is your responsibility to verify that all materials reflecting the assessment setting are complete and current before going on-site.**

If the candidate indicates there is a problem with any of the items, do not schedule the visit. Contact the PDS Team (pds@cdacouncil.org) to receive further instructions.

2.2 Request Directions to the Site

We suggest you obtain the full address and phone number to the assessment site from the candidate to avoid any delays in finding the location. A delay could result in having to reschedule the entire evaluation.

2.3 Contact the Program Director

You are responsible for making a courtesy call to the program director to:

- Introduce yourself and show appreciation for their support of the candidate
- Inform the director of the schedule arranged with the candidate and answer any general questions regarding the CDA Verification Visit™.
- Confirm with the director that the candidate has arranged for a private place to conduct the review and the reflective dialogue.
- **Emphasize that all assessment information is confidential between the candidate and the Council.**

The evaluation of the candidate takes place only during the **R.O.R. Model®**. It is important that you adhere to the professional protocol in all dealings with the program director and other personnel. Do not discuss the candidate's performance with the director or any other staff.

2.4 Council Support with Scheduling Assessments

Please contact the PDS Team if there are any issues with your *Pre-Verification Visit Checklist* with the candidate. The following list contains some common scenarios that may require guidance from the PDS Team:

- Inability to reach a candidate to conduct the *Pre-Verification Visit Checklist* interview. (e.g., incorrect phone number or email address). Please do not enter a **“No Show”** code in the *Scoring Tool*. Instead, contact the PDS Team immediately.
- A candidate does not speak, read, and/or write in the language of the assessment well enough to proceed.
- Uncertainty about conflict of interest (See *The Role of the CDA Professional Development (PD) Specialist™* located on page 2.)
- The setting type does not match. The candidate states one type of setting while your *Scoring Tool* indicates another.
- A candidate is applying for a **second credential** and he/she does not appear in your *Scoring Tool*.
- **Conducting a CDA Verification Visit™ before a candidate appears in your *Scoring Tool* is invalid and will need to be re-done.** Please carefully monitor your *Scoring Tool* before you schedule a CDA Verification Visit™.

CDA Verification Visit™

3.1 CDA Verification Visit™ Preparation

Prior to the CDA Verification Visit™, you should always:

- Review the setting-specific *CDA® Competency Standards* book and the *13 Functional Areas*. This information can be found on page 37 in this manual and in the *PDS Portal Resource Library*.
- Review the format of the *Comprehensive Scoring Instrument* (CSI) to become comfortable and totally familiar with all the 51 items and indicators.
- Rehearse the reflective dialogue process. It is recommended you practice this, but it is not a requirement to follow the suggested script verbatim during the CDA Verification Visit™.
- Review your copy of the *Pre-Verification Visit Checklist*.
- Perform a ‘practice’ observation using a copy of the CSI to become acquainted with the tool.

To ensure prompt arrival at the CDA Verification Visit™:

- Review the directions to the site and estimate travel time.
- Allow extra time for unforeseen delays.

3.2 Necessary Forms and Documents

Bring the following items with you to the CDA Verification Visit™:

- Your photo identification
- *Pre-Verification Visit Checklist* for the candidate
- Copy of the *Comprehensive Scoring Instrument* (CSI)
- Copy of *CDA Verification Visit™ Reflective Dialogue Worksheet*
- Writing tools and supplies.
- PDS Team contact information

3.3 Arriving at the Site

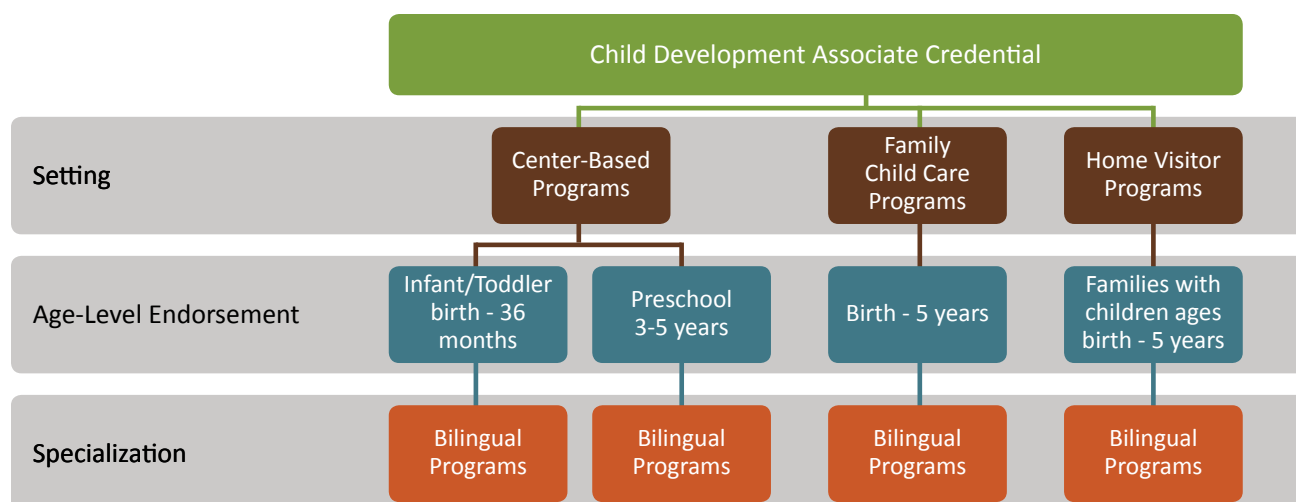
You must arrive at the CDA Verification Visit™ on time and dressed in a professional attire, as you are representing the Council for this assessment. If an emergency forces a delay in your arrival to the site, please notify the candidate immediately and the center director, if possible. If the candidate does not arrive according to the scheduled date and time for the CDA Verification Visit™, and is not at the site within 30 minutes, please contact the PDS Team as soon as possible by email and phone. Do not enter the “No Show” code in the *Scoring Tool* until you hear from the PDS Team.

A typical arrival scenario is as follows:

- Present your photo identification and introduce yourself to the candidate and director. Locate the workspace and secure your belongings.
- After validating the candidate's identification, confirm the CDA Verification Visit™ schedule to follow the R.O.R. Model®.
- Accept the candidate assessment materials (*Professional Portfolio* and setting specific CDA® *Competency Standards* book). The candidate must have an original book. Photocopies of the book are not allowed.
- If needed, clarify with the candidate where you will meet for the reflective dialogue once you have completed the review and observation.
- **If the setting does not correspond with the one provided by the Council**, but it corresponds with the candidate's *Professional Portfolio*, you should continue with the CDA Verification Visit™. Please contact the PDS Team immediately before entering the scores.
- **If the setting does not match the candidate's *Professional Portfolio*, do not proceed with the visit.** Please contact the PDS Team. This scenario can be avoided if the required checklist is completed properly during the pre-verification telephone interview.
- **If the candidate does not have their *Professional Portfolio***, please inform the candidate that you will continue with the observation portion of the CDA Verification Visit™. In this scenario you will need to return to review the portfolio and conduct the reflective dialogue within the 7-day R.O.R. window. If you are unable to accommodate the candidate within the 7-day window, please stop the visit. You should inform the candidate that they will have to contact the Council to reauthorize another CDA Verification Visit™. In this case, please contact the PDS Team **before** entering "No Show" in your online *Scoring Tool*.

3.4 CDA® Credential Settings

The **identification of the setting** for each CDA Verification Visit™ is critical to a seamless assessment. Please view the chart below. Detailed information on each of the CDA® credential settings can be found in the *Helpful Documents* section of this manual on page 35.



3.5 Special Education Program

A “Special Education” child development setting is designed to serve children with moderate to severe special needs, and it does qualify as an eligible setting for the CDA® assessment. The *CDA® Competency Standards* addresses the skills that early childhood educators need to serve children with special needs. The program must meet the other criteria described above for a Preschool, Infant/Toddler, Family Child Care or Home Visitor setting. The chronological ages of the children with special needs must also match the age groups specified for each setting.

3.6 Portfolio Review Process

The purpose of the review is to provide the CDA PD Specialist™ time to study the candidate’s prepared professional materials – this is one method of collecting information to support the CSI scores. This review can be scheduled before or after the candidate’s observation and it must be done in private. **Under no circumstances should you take the candidate’s *Professional Portfolio* home to review.** The candidate’s *Professional Portfolio* is defined as the collection of documentation portraying the candidate’s ability to meet all CDA® eligibility requirements. The portfolio provides a compilation of the candidate’s reflection on how his/her practice meets the *CDA® Competency Standards*.

The *Professional Portfolio* consists of:

- Divider/cover sheets (3)
- Official training documentation
- Family Questionnaires
- Reflective Statements of Competence (6)
- Resource Collection (23)
- Reflective Professional Philosophy Statement

Please see page 46 for a detailed list of the portfolio’s contents for the Preschool, Infant-Toddler and Family Child Care settings. The portfolio contents for the Home Visitor setting can be found on page 81.

As a CDA Professional Development Specialist™, you must be familiar with the portfolio requirements for the setting you will be observing the candidate in to ensure your review reflects the full content.

3.7 Requirements for the Review

- The CDA PD Specialist™ should spend one hour reviewing the candidate’s *Professional Portfolio*.
- The review must be in a private space that prevents interruption.

- If there is an item in the candidate's portfolio that is missing or is a concern, the CDA PD Specialist™ must record it on the last page of the *Comprehensive Scoring Instrument* (CSI), and enter this information online when submitting the candidate's CSI scores.
- Under no circumstances should a CDA Verification Visit™ be terminated if items from the portfolio are missing.
- The CDA PD Specialist™ should not allow the candidate additional time to make up or provide any missing materials at a later date.
- The review of materials can be done before or after the candidate's observation.

3.8 Organization of the Professional Portfolio

The candidate may choose to arrange the portfolio in any creative way (i.e., organized in a three-ring binder, using folders in a file box or even created online). There are no specific requirements about how the portfolio is presented, with the exception that it should be legible, well organized, and be manageable in size and portability.

The organization of the contents requires the use of the divider/cover sheets that are provided to every candidate as perforated pages in the back of their *CDA® Competency Standards* book. Using the cover sheet, *My CDA® Professional Portfolio* as the portfolio index, the candidate follows the outline provided to present the contents of specific tabbed sections sequentially. The candidate must sign and date this sheet when the *Professional Portfolio* is completed attesting to validity of the contents and meeting all requirements. Please see the *Helpful Documents* for an overview of the tabbed sections of the portfolio (for the Preschool, Infant-Toddler and Family Child Care settings) on page 46. The portfolio contents for the Home Visitor setting can be found on page 81.

3.9 Documentation of Education Requirements

Every CDA® candidate must complete 120 clock hours of professional early childhood education, with no fewer than 10 hours in each of the eight CDA® Subject Areas. Training may be obtained through 2 and 4-year colleges, private training organizations, or high school career and technical programs. Resource and referral agencies and early childhood education programs such as Head Start and the U.S. Military are also sources for training.

The candidate may accumulate the hours from a single training program or a combination of programs. Each agency or organization must provide verification of all education in the form of a transcript, certificate or letter on official letterhead. For online CDA® training, electronic certificates are acceptable. The Council accepts in-service training and training from Council-endorsed state registries, but it does not accept training obtained at conferences or from individual consultants. Please see the *Training Documents Guidelines* on page 47, as well as the *Summary of My CDA® Education* checklist on page 48 for more details. The *Summary of My CDA Education* checklist for home visitor candidates can be found on page 82.

4.0 Family Questionnaires

As the CDA PD Specialist™, you will need to review the *Family Questionnaires Summary Sheet*. This sheet summarizes all the questionnaires the candidate distributed to families in the candidate's setting under his or her care. Information on the families' perceptions of the candidate's strengths and areas needing professional growth are crucial to the CDA® credentialing process. You are required to:

1. Verify the total number of questionnaires collected matches the number written on the *Family Questionnaire Summary Sheet*.
2. Ensure the candidate received 51% or more questionnaires than the amount that were distributed to families.
3. The area(s) of strength and professional growth are entered on the *Family Questionnaires Summary Sheet* and on the *CDA Verification Visit™ Reflective Dialogue Worksheet*. This feedback is considered during the reflective dialogue/discussion as you guide the candidate to set professional goals for themselves.

An example of the *Family Questionnaires Summary Sheet* is provided in the *CDA® Competency Standards* book, in the *PDS Portal Resource Library*, and in this manual on page 49.

4.1 Resource Collection

The *Resource Collection* is an assembly of early childhood resources the candidate has collected for the portfolio. It is one of the most valuable components of their portfolio, as it constitutes the basis for the candidate's *Reflective Statements of Competence*. The information gathered in the resource collection includes experiences, activities, and resources that the candidate utilizes during daily practice..

4.2 The Reflective Statements of Competence

The *Reflective Statements of Competence* require no precise format. However, the content must include the main points outlined in each statement's requirements in the *CDA® Competency Standards* book for the credential setting type. The questions for each competency statement are developed to help prompt deeper, expanded thought and personal reflection on the individual functional area within each *CDA® Competency Goal*.

CDA PD Specialists™ should use their professional judgment in determining whether or not the candidate's *Reflective Statements of Competence* meet the requirements set forth by the Council as described in the *CDA® Competency Standards* book. A level of variance in CDA PD Specialist™ opinions, statement interpretation, and scoring is natural and expected. You should trust and rely upon your own professional judgment providing that the candidate's statements meet the established requirements. Be sure to evaluate each candidate's work individually and avoid comparing candidates with one another.

4.3 Reviewing the Candidate's Reflective Competency Statements

As the CDA PD Specialist™, you should read the candidate's statements for their content. Statements should also include responses to the specifics required for each of the six *CDA® Competency Goals*. Any additional candidate information to assist, as necessary, in reaching a final rating for each item in the Comprehensive Scoring Instrument (CSI) should be utilized. Please refer to page CSI-3 in the CSI for more clarity and review the ***Requirements for Candidate's Reflective Statements of Competence*** on page 50 in this manual for more details.

You must read and verify each of the six *Reflective Statements of Competence* to ensure the candidate adequately addresses the statement requirements and record any of the review notes in the CSI.

- These statements form a foundation of information that you may later draw upon in the reflective dialogue discussion.
- Your comments should be concise and to-the-point when conveying the candidate's individual reflection on their practices.
- You should record what is missing in the statements. Evaluate how the statements address the *CDA® Competency Goal* through personalized goals and individual activities designed for the children and families with whom the candidate works. **Note: CDA PD Specialists™ are not evaluating grammar and sentence structure, but rather the message and relevant content within each statement.**
- When reviewing *Reflective Statements of Competence*, record all comments in the notes section in CSI, not on the statements themselves.

4.4 Recording Problems with Competency Standards Statements

If the information you are reviewing is not appropriate, just note the problem on the CSI tool on page CSI-20. **Do not explain, question or share with the candidate the inappropriateness of his or her documentation.** If, during the verification of the documentation, you find that information is missing, make a note to ask the candidate **during the reflective dialogue**. **In both cases, there is no need to call the Council.**

Note: For bilingual language assessments:

- The six (6) *Reflective Statements of Competence* must include information regarding the candidate's bilingual activities and goals:
- Three reflective statements should be in the other language.
- Three reflective statements should be in English.
- Within the *Resource Collection*, resource items # 4, 5, 6, 7, 11, 12, 15 and 16 must be provided in both languages.
- The *Professional Philosophy Statement* may be in either language.

Indicate if any of the above items in 13.4 are 'not met' on page CSI-20 of the *Comprehensive Scoring Instrument* (CSI).

4.5 Professional Philosophy Statement

The *Professional Philosophy Statement* is the final reflective task in the creation of the *Professional Portfolio*. Here, the candidate summarizes his/her professional beliefs and values about early childhood education after completing the professional development experience of designing the portfolio. The *Professional Philosophy Statement* should be no more than two pages in length or approximately 500 words.

The candidate identifies personal values and beliefs around teaching and learning by answering the question, “How do young children learn?” Based on this response the candidate should also respond to the question, “What does the candidate believe their role is?” Beyond teaching and learning, the candidate reflects and writes about other critical aspects of their role in the lives of children and families.

Remember, the *Reflective Statements of Competence* and the *Professional Philosophy Statements* are not critiqued for grammar, spelling or punctuation; nor is the number of words counted. The candidate is to make every attempt to remain within the two-page typed parameter.

4.6 Conducting the Observation

The purpose of the candidate observation, within the context of the R.O.R. Model®, is to record evidence of the candidate’s consistent behavior/competence in each of the CDA® 13 Functional Areas. The *Comprehensive Scoring Instrument* (CSI) is the observation tool and the primary tool for assessing a candidate’s competence. The observation may be scheduled before or after the candidate’s review session. This should be conducted during regular operating hours in the same setting/program as indicated on the application. **A CDA PD Specialist™ may not change or propose a change of setting for the observation.**

Candidate observations are critical for the Council because they help paint a fair and accurate picture of the individual’s strengths and developmental areas in working with young children, families and colleagues. Understand that being observed in the classroom may be unsettling for even the most experienced candidate. **As the CDA PD Specialist™, you should make every effort to support the candidate and reduce stress.**

4.7 Recording Evidence

You should always use the *Comprehensive Scoring Instrument* (CSI) found at the back of the CDA® *Competency Standards* book for the 2-hour observation. The candidate needs to be in the role of the lead teacher regardless of their current position at the site.

Sources of evidence may be found in the form of teacher-child interactions, materials and equipment used by the candidate, by reviewing the portfolio and examining the environment. Therefore, when using the CSI during your observation, you may choose to record in the appropriate note boxes any evidence you observe to help you make a final determination later. For some items however, a score of 3 can be immediately applied

without the need for notes. Examples include:

- Classroom environment
- Evidence of children's activities and work
- Lesson plans
- Evidence of diversity
- Labelling
- First-aid kit
- Evacuation plan
- Candidate's communication with children, co-workers, and parents
- Candidate's adherence to the daily schedule

Be objective in your observation of the candidate. Don't penalize for circumstances/situations beyond his/her control. For example, if a center has limited toys for children, do not use this information against the candidate. Instead, focus on the candidate's abilities in controlling the environment by utilizing the limited number of toys with the children under his/her care.

Please see the *Checklist for the Observation* on page 50.

4.8 Reflective Dialogue

The reflective dialogue is the last step in the R.O.R. Model® for the CDA Verification Visit™. This dialogue is approximately one hour and must be conducted in a private space protected from interruptions. The materials you need for the reflective dialogue are:

- The candidate's partially completed *CDA Verification Visit™ Reflective Dialogue Worksheet*.
- The candidate's *Professional Philosophy Statement*.

At the end of the session, the candidate must have a completed confidential *CDA Verification Visit™ Reflective Dialogue Worksheet* where areas of strengths and future professional growth are identified with up to three goals and action plans to achieve those objectives.

4.9 Reflective Dialogue Process

- The purpose of the dialogue is to support the candidate's developing skills of professional reflection and goal setting.
- Set a relaxed tone for the dialogue to minimize the candidate's anxiety and to help the candidate feel comfortable.
- Be sure that the candidate understands this process is a conversation to assist them with establishing their future professional goals.
- You are required to follow the pre-set agenda and may include additional questions if you feel more information is needed to complete scoring in the *Comprehensive Scoring Instrument*.

- Accept and acknowledge the candidate's answers without making judgments. Facilitate a thoughtful and reflective conversation.
- There is NO score or rating given in the reflective dialogue as it is and remains the culmination of the professional development experience.
- For bilingual settings, the CDA PD Specialist™ conducts the reflective dialogue in both languages.
- Conclude the reflective dialogue with the completion of the *CDA Verification Visit™ Reflective Dialogue Worksheet*, which the candidate retains to guide future professional development.
- You must return the signed reflective dialogue, completed *Action Planning Worksheet*, and the *Professional Portfolio* to the candidate.

Please note: The CDA PD Specialist™ may not photocopy or remove any portion of the candidate's Professional Portfolio from the center or home.

Please review the *Agenda for the Reflective Dialogue with a Candidate* on page 52 and on page 83 for home visitor candidates.

Once the CDA Verification Visit™ has ended, please inform the candidate that your role as his/her CDA PD Specialist™ is ending and you will not be in further contact with him or her. If the candidate needs to inquire about his or her credentialing status or has any further questions regarding the assessment, the candidate must contact the Council. The candidate should discard your contact information.

Special Circumstances

5.0 Special Circumstances

The following scenarios require the Council to provide special accommodations for CDA® candidates such as:

- Administering paper exams for candidates who have been approved to be assessed in another language and for candidates in remote locations where there is no Pearson VUE testing center.
- CDA® candidates needing ADA accommodations.
- **Pre-approved** remote travel for CDA PD Specialists™ conducting CDA Verification Visits™ over 100 miles away.

5.1 Administering the CDA® Paper Exam to Candidates

For Remote Candidates

To administer a CDA® paper exam, the Council and the candidate's program must make prior arrangements for the CDA PD Specialist™ to facilitate the exam after the CDA Verification Visit™. The Council works closely with the CDA PD Specialist™ and provides him/her technical assistance and coaching to ensure the successful administration of the paper exam.

For Candidates Applying in Another Language (Monolingual & Bilingual)

The CDA PD Specialist™ will work with an interpreter provided by the candidate's program and approved by the Council. The CDA® paper exam consists of 60 multiple-choice questions that a CDA PD Specialist™ reads in English, and the interpreter translates to the candidate in the other language, after which, the candidate responds in writing. After you give instructions with the assistance of the interpreter, the candidate has two hours to complete the exam.

Please refer to the process for *Facilitating a CDA Verification Visit™ for Monolingual and Bilingual Candidates* on page 54.

Location of Exam

The CDA® exam must take place in a quiet, comfortable environment without any interruptions and where adult size chairs and tables are available. Appropriate sites include a private room in the candidate's program, a private room at the local library, private office space at a *Resource and Referral Agency*, or a college meeting room. Family child care exams require space other than in the provider's home. Privacy and the absence of interruptions are important. The family child care home or any home should only be used as a last resort or when there is an emergency. Should this be the case, the Council PDS Team must be notified prior to the exam date.

Note: *Number 2 pencils are required to take the exam. You should bring extra pencils to the exam.*

Before the Exam

You will greet the candidate and interpreter upon arrival. The interpreter begins to work as soon as the conversation begins. The three of you will work together for the entirety of the exam.

- Allow 20 minutes for giving instructions allowing time for the interpreter to translate, and two hours for the candidate to take the exam.
- You should let the candidate know that once the exam starts, leaving the room is prohibited until the exam is finished.
- No visual aids such as notes, dictionaries, or thesauruses are allowed.
- Everyone must turn off cellular phones during the entirety of the exam.

Suggestion: *Prior to the start of the exam, the candidate, CDA PD Specialist™, and interpreter should take a few minutes to take care of any personal needs.*

Administering the Exam

- Place a "Do Not Disturb" sign on the door to avoid any interruptions, and keep all doors closed to the room.
- Give the sealed exam to the candidate and ask him/her to break the seals on the exam.
- Help the candidate to complete the first page of information.

- **Recite the following instructions to candidates:** You will have two hours to complete the Exam. If you finish before the two hours, we may help you check your exam over and re-read any questions you may have skipped. Or you may turn in your test early, if you wish. Once given to me, I cannot return it to you for any reason. The exam consists of 60 multiple choice questions. We will be working with Ms. _____ or Mr. _____, the interpreter, who will translate the questions and answers in _____ (other language) to you. You will select the best of the four answers for each question by darkening the oval next to the answer you consider to be the correct one. You should listen to each question and the answers carefully before you choose. Neither I, nor the interpreter, are allowed to help you answer any test questions, or explain the questions in any way. Do you have any questions before we begin? Is the way we will conduct this exam clear to you?”
 - Facilitate practice of the sample questions using the second page of exam. Read each question in English; provide time for the interpreter to tell candidate what you read in the other language. Then the candidate selects the answer he or she considers as the correct one. You may answer any questions the candidate may have about the sample questions only.
 - At the completion of the practice sample questions, ask the candidate to STOP before turning the page.
 - Once the practice is finished, the exam time begins.
 - You must remain in the room with the candidate at all times.
 - Record the start and end times of the exam at the bottom of the form.
 - For the actual exam follow the same procedure as the sample questions. Read each question in English, provide time for the interpreter to translate to the candidate what you read. The candidate selects the answer he/she considers as the correct one for each of the 60 questions.
 - Please provide a one hour, as well as a ten-minute warning before the two-hour period is over. If the exam time goes a little over the two hours, do not worry, use your professional judgment. Please avoid rushing the candidate.
 - Return the exam in the pre-paid envelope provided by the Council. Please take the envelope to the post office and hand it to a postal agent. Do not drop it in a street mailbox as the post office may destroy it.

5.2 Special Accommodations

The Council offers reasonable accommodations to candidates with disabilities working towards earning a CDA® Credential. Accommodations fall under the Americans with Disabilities Act (ADA), and its mission to “make it possible for everyone with a disability to live a life of freedom and equality.” As stated by the ADA, an individual with a disability requiring an accommodation must be otherwise qualified to apply for the CDA® Credential, and inform his or her employer of the disability. Also, the Council is not required to make

an accommodation if it would impose an “undue hardship” on the operation of the CDA® assessment system. Alternatively, as stated by the candidate’s employer, the assessment must not impose an “undue hardship” on the functioning of the early childhood program and/or the children served.

Reasonable accommodations are any modifications or adjustments that enable the candidate with a disability to participate in the assessment process. These accommodations ensure that a candidate with a disability has the same rights and privileges equal to those candidates without disabilities. Such reasonable accommodations include the option to administer the CDA® written exam to the candidate orally. Accommodations also include extended time for the written exam; and offering Sign Language Interpretation at the Council’s cost for candidates who require it, among others.

Requesting CDA® Exam for ADA Accommodations

Candidates needing special accommodations should send their *CDA® Exam Special Accommodations Request Form* along with a copy of medical documentation supporting the request directly to accommodations@cdacouncil.org. The request must occur in advance, **before applying for the assessment**. The *CDA® Exam Special Accommodations Request Form* can be downloaded from our website at www.cdacouncil.org/resources/downloadable-forms.

Official Council Approval

The Council makes decisions as to the appropriate accommodation based on the particularities of each case. In selecting the particular type of reasonable accommodation to provide, the Council’s fundamental principle is that of effectiveness. This accommodation provides the opportunity for a candidate with a disability to achieve the same level of performance equal to those of an average, similarly situated candidate without a disability. However, the accommodation does not have to ensure equal results or provide exactly the same assessment outcomes.

How to Apply for Assessment: Candidates will receive a copy of their officially approved *CDA® Exam Special Accommodations Request Form* and a letter with specific instructions from the Council BEFORE submitting the paper application. Candidates need to attach a copy of the approved *CDA® Exam Special Accommodations Request Form* to their paper application.

5.3 Pre-Approved Remote Travel Procedures

Remote travel is considered when a candidate’s center or location is more than 100 miles from the nearest CDA PD Specialist™. In such situations, the Council may implement its remote travel policy to support candidates and CDA PD Specialists™. The following describes the official procedure used to respond to requests for remote travel and subsequent reimbursement for travel expenses.

If a candidate is unable to find a CDA PD Specialist™ **within 100 miles** of the center in which they serve and they reach out to the Council:

- The PDS Team will verify the inability to locate a CDA PD Specialist™ within the candidate's local geographical area. They will also verify the candidate has attempted to locate a CDA PD Specialist™ using the *Find-a-PD Specialist™ Online Directory*.
- Once all efforts have been exhausted to find a local CDA PD Specialist™, the PDS Team will conduct a larger search in surrounding areas.

If the PDS Team contacts you as a potential CDA PD Specialist™ for a remote candidate you have the option to accept or decline the request by responding to the PDS team within 48 to 72 hours. If you accept the request sent by the PDS Team:

- The Council PDS Team will compile projected travel expenses and submits the information for approval.
- Once the travel request is approved, the PDS Team will send the CDA PD Specialist™ an email with a completed *PDS Remote Expense Voucher*. The PDS Team will contact the candidate to provide the name, phone number, email, and PDS ID number of the approved and available CDA PD Specialist™ to add to their application.
- Upon completion of the CDA Verification Visit™, the CDA PD Specialist™ submits the remote travel expense form along with all receipts within 48 hours of submitting the scores.

If a candidate contacts a CDA PD Specialist™ who is **more than a 100 miles away**, the CDA PD Specialist™ will need to verify that the distance from their location to the candidate is 100 miles or more. (Note: We recommend using the CDA PD Specialist™ Search Portal or Google Maps to calculate the distance.)

- If mileage meets the 100 mile minimum or more, the CDA PD Specialist™ must contact the PDS Team via email at pds@cdacouncil.org with the email subject line: *Remote Travel Inquiry*. Include in your email the following information:
 1. Candidate's first and last name and contact information (i.e phone and or email)
 2. Program and language setting
 3. Candidate full address, including the zip code
- After receiving the above information the PDS Team will verify and follow up within 48 to 72 hours, regarding the approval or denial of the inquiry. Once the PDS Team contacts you regarding the approval or denial of the request, you must contact the candidate and follow up regarding the outcome.
- At the end of the CDA Verification Visit™, the CDA PD Specialist™ submits the remote travel expense form along with all receipts within 48 hours of submitting the scores.

All travel requests will include the projected cost and applicable travel considerations. Once you receive your travel itinerary including the projected cost from the PDS Team, you must reply to confirm approval. Below are the current rates for travel:

Per Diem Rates:

Full Day: \$25

½ Day Travel: \$17.50

Mileage: \$.40 per mile

Note: Overnight hotel accommodations are only included if deemed necessary and are approved by the PDS Team.

Please Note: *The Council only reimburses for travel for CDA Verification Visits™ that receive **advanced approval** from the Council PDS Team. The Council does not reimburse retroactively any travel expenses that did not receive advance official approval from the Council.*

After the CDA Verification Visit™

6.1 Submitting Candidate Scores

Once the CDA Verification Visit™ has concluded and you are now ready to submit the candidate scores online. You are required by to submit the candidate's scores electronically in the *PDS Portal Scoring Tool* **within 48 business hours or before the candidate's six-month expiration date to complete their CDA Verification Visit™, whichever comes first.** You will need the hard copy of the *Comprehensive Scoring Instrument* (CSI) that you removed from the back of the candidate's *CDA® Competency Standards* book. Your candidate's scores must be submitted in your *Scoring Tool* via the *PDS Portal*.

You will need to open the *Scoring Tool* and click on the candidate's name. Once the tool is open:

- Confirm that the name at the top of the page is the correct candidate's name.
- Confirm the credential type and the language of assessment, including specialization, is correct.
- Be sure to provide the exact date for the review and the exact date for the candidate observation. Month names are not acceptable; you must use numeric dates. Please follow the directions precisely (ex. 06.17.2015).
- The online *Scoring Tool* is laid out in the exact same order of the CSI so that you can quickly follow the hard-copy document used in the candidate's CDA Verification Visit™ by transferring the scores and any written notes in order as required.
- You should read the directions thoroughly to avoid any scoring submission problems.
- OPTIONAL: Add notes in the "Notes Box" for each evidence score recorded during the CDA Verification Visit™. ***All notes and observations are helpful in assisting the Council with determining the validity of issuing the CDA® Credential. Please include very specific notes to document and justify scores, explain rationale, or provide examples that led you to choose that score.**

- Please remember to review each screen page and to double check entries prior to proceeding. The electronic signature requirement at the end of the document is where you confirm that there is NO conflict of interest or violation of Council policies and procedures between you and the candidate.
- The online *Scoring Tool* ratings must be completed in its entirety.
- When you enter a score of “1” a note is required to explain the missing evidence.
- If you enter a score of “2”, we recommend that you provide us with notes to justify your score. This is necessary if a candidate is denied and seeks an appeal. Your notes will be critical in this process.

The CSI scores must be kept confidential. Once the recommended scores have been submitted to the Council online, you are required to keep it, as well as the candidate's *Pre-Verification Visit Checklist*, for six months.

Honorarium

7.1 Payments and Expenses

Being a CDA PD Specialist™ is a contribution to our profession that cannot be adequately compensated. As recognition of your service, the Council offers CDA PD Specialists™ a \$100 honorarium for each completed CDA Verification Visit™.

The honorarium payment automatically generates when you electronically submit the CSI scores to the Council through the online *PDS Portal*. You will need to register with *Anybill*, our online direct deposit service provider, in order to receive your honorariums. Please visit the online *PDS Portal* for more information.

Keep in mind, as a contractor, you are responsible for paying all taxes applicable to the payment of an honorarium. The Council reports honorarium income to the IRS using Form 1099-MISC for each calendar year when an individual's income is \$600 or more. As required by IRS regulations each CDA PD Specialist™ receives a prepared copy of the 1099-MISC.

As an independent contractor, you understand and agree never to charge a candidate or related programs additional fees for conducting a CDA Verification Visit™. Violation of this contractual agreement results in your termination without an opportunity to reapply for the role. Additionally, the Council reserves the right to withhold or delay honorarium payments due to improper delivery of services to a candidate or contract violations.

CDA PD Specialist™ Contract

It is important to carefully review the CDA PD Specialist™ contract which clearly defines your relationship with the Council. A copy of the contract is in this manual on page 114. If your availability changes in the short term, you do have the option to temporarily remove yourself from the *Find-a-PD Specialist Online Directory* as needed. If, for any reason, you need to end your relationship as an independent contractor, please inform us in writing at pds@cdacouncil.org.

Home Visitor CDA Professional Development (PD) Specialist™ Verification Visit Process

Please use this handy process guide for your CDA Verification Visit™ with Home Visitor CDA® candidates. (Only for CDA PD Specialists™ with the official home visitor endorsement.)

BEFORE THE CDA VERIFICATION VISIT™

1. Candidate selects you as a possible Home Visitor CDA PD Specialist™ for their CDA Verification Visit™. **You will receive an inquiry from the candidate.**
 - Respond to the candidate whether or not you can serve as their Home Visitor CDA PD Specialist™ **within 24-48 hours.**
 - If you agree to serve as the CDA PD Specialist™, you will need to provide the candidate your CDA PD Specialist™ ID number for their CDA® application.
 - Candidate submits paper application with payment to the Council.

***** DO NOT SCHEDULE THE CDA VERIFICATION VISIT™ UNTIL THE CANDIDATE'S NAME APPEARS IN YOUR LIST OF OFFICIAL CANDIDATES IN YOUR SCORING TOOL *****

READY TO SCHEDULE

1. The candidate receives a *Ready to Schedule* (R2S) notice. **The candidate will appear in your online Scoring Tool.** The candidate will have up to six months from their R2S notice to complete the CDA Verification Visit™ and the CDA® Exam.
2. **Once the candidate appears in your Scoring Tool, contact the candidate within 5 business days and schedule the CDA Verification Visit™**
 - a. **Conduct the Pre-Verification Visit Checklist interview.** Confirm the candidate's name, correct setting, language, completed portfolio, family's name and address for the observation, and date and location for the review and reflection.
 - b. **Confirm that the candidate has the correct CDA® Competency Standards book** (latest edition – June 2016 – purple color) and that the candidate has an original book, not a copy.
 - c. **Verify the candidate's information in the PDS Portal.** Confirm that the information provided by the candidate corresponds with the information in your *PDS Portal Scoring Tool*. If you find any discrepancies, contact the PDS Team via

email and wait to receive confirmation that the issue has been resolved prior to completing the CDA Verification Visit™. Please do not try to resolve any concerns on your own.

3. **Contact the candidate's supervisor or director.** Thank him or her for supporting the candidate and answer any questions. Confirm the location, date, time, and location of the family visit, review of the portfolio, and reflective dialogue. Avoid any conversation related to the candidate's performance.

HOME VISITOR CDA VERIFICATION VISIT™

** The review and observation can be done in any order; the reflective dialogue must be last.*

1. For the Review (1 hour in private room) –

- a. Arrive on time, introduce yourself to the candidate and check the candidate's ID.
- b. Obtain the candidate's *Professional Portfolio* and *Home Visitor CDA® Competency Standards* book.
- c. Review the portfolio in a private area without the candidate present.
- d. End review and return the candidate's *Professional Portfolio*.
- e. **Keep the candidate's CDA® Competency Standards book with your CSI notes, the Home Visitor CDA® Assessor Recommendation Form (remove it from the sealed envelope to share with the Council), and the Parent Observation Permission Form (needed for the observation).**

2. For the Observation (1-3 hours –in accordance with the home visitation program policies- at the home of one of the families from the candidate's caseload)

- a. Arrive at the home, introduce yourself to parents, other adults and the candidate. Check candidate's ID.
- b. Thank the parent for signing the *Parent Observation Permission Form* (in your possession).
- c. Use CSI in candidate's *Home Visitor CDA® Competency Standards* book (purple color) to conduct observation of candidate.
- d. **Keep the candidate's CDA® Competency Standards book to conduct the reflective dialogue.**

3. For the Reflective Dialogue (1 hour in private room, not in the family's home)

- a. Arrive at location, obtain candidate's *Professional Portfolio*.
- b. Conduct reflective dialogue using the *CDA Verification Visit™ Reflective Dialogue Worksheet*.

4. End visit and return the candidate's *Professional Portfolio* and *CDA® Competency Standards* book. Keep the *CSI*, *Parent Observation Permission Form*, and *CDA® Assessor Recommendation*. Do not share scores with the candidate.

AFTER THE CDA VERIFICATION VISIT™

1. Submit candidate's *CSI* scores online in the *Scoring Tool* within **48 business hours** or before the candidate's six month expiration date to complete the *CDA Verification Visit™*, whichever comes first.
2. Keep the original *CSI* scores, the *Pre-Verification Checklist*, the *Parent Permission Observation Form* and the *Home Visitor CDA® Assessor Recommendation Form* for **six months**.

Home Visitor Credential Overview

Before the CDA Verification Visit™

Home Visitor CDA PD Specialists™ will follow the same procedures outlined in the **Before the CDA Verification Visit™** section of this manual (pages 6-8). Please visit the handy process guide on page 26 for the main steps.

Ready to Schedule

Once a candidate receives a *Ready to Schedule* (R2S) notice, the candidate will have up to six months from appearing in your *Scoring Tool* to complete the CDA Verification Visit™.

As the selected CDA PD Specialist™ for a CDA® home visitor candidate, you must follow the procedures below.

1. Verify that the candidate is in your online *Scoring Tool* before you contact the candidate.
2. Contact the candidate within 5 business days of seeing the candidate's name in your *Scoring Tool* to conduct the *Pre-Verification Visit Checklist*.
3. When you contact the candidate to schedule the CDA Verification Visit™, use the *Pre-Verification Visit Checklist* to:
 - a. Verify the candidate's setting (home visitor). Ask the candidate for the color of the CDA® *Competency Standards* book used to prepare for the assessment. The *Home Visitor CDA® Competency Standards* book is purple in color.
 - b. Verify the candidate's home visit location, the name of the family and the name of the candidate's director.
 - c. Confirm the location(s) for the review of the candidate's portfolio, the family's home for the observation, and the reflective dialogue. All three steps of the R.O.R. must be completed within 7 business days and can be completed at different locations. The review of the candidate's portfolio and the observation of the candidate conducting a home visit can be done in any order. However, the reflective dialogue must be completed as the last step of the R.O.R. Model®. For example, a candidate may schedule the observation with a family first and schedule the review and the reflective dialogue at another location.
 - d. Confirm that the candidate has a completed Home Visitor portfolio with all the required documentation (e.g., First Aid and Infant/Child (pediatric) CPR, formal education, family questionnaires, CDA® *Assessor Recommendation Form*, etc.) as well as a signed *Parent Observation Permission Form* for their observation. The candidate may need to contact you again to confirm the date and time for the observation after consulting with the family's availability. The Council has recommended the candidate to prepare a plan B, with another family of her or his caseload, in case of an emergency to replace the original family scheduled for the visit. Therefore, the candidate may secure a second *Parent Observation Permission Form*.

4. Contact the candidate's supervisor or director. Thank him or her for supporting the candidate's efforts to achieve the CDA® Credential and answer any questions they may have. Confirm the date(s) and time(s) arranged with the candidate for the CDA Verification Visit™. Avoid any type of conversation related to the candidate's performance.

CDA Verification Visit™

The Home Visitor CDA PD Specialist™ will need to follow the R.O.R. Model® to properly assess a candidate for the Home Visitor CDA® Credential. Key components of the R.O.R. Model® (Review-Observe-Reflect™) can be completed at separate locations over a 7-day period. The review of the portfolio and the observation of the candidate can be done in any order, but the reflective dialogue with the candidate must be completed at the end of the visit. The portfolio review and the reflective dialogue must be completed in a quiet, private location. Please review sections 3.1 and 3.2 for preparation tips prior to the CDA Verification Visit™ process.

Review (1 hour) in a private room without the candidate present.

The review of the candidate's portfolio must be done with the candidate's *CDA® Competency Standards* book. The candidate must have an original book; photocopies are not allowed. The *Professional Portfolio* consists of:

- *My CDA® Professional Portfolio* cover sheet
- *Summary of My CDA® Education* cover sheet with the candidate's training transcripts, certificates and/or letters
- *Family Questionnaires* and *Family Questionnaires Summary Sheet*
- *CDA Verification Visit™ Reflective Dialogue Worksheet* (boxes A & B are completed)
- *Parent Observation Permission Form* (completed and signed) from the family where observation will take place
- *Home Visitor CDA® Assessor's Recommendation Form* (in a sealed envelope)
- *Resource Collection*
- *Six Reflective Statements of Competence*
- *Professional Philosophy Statement*

Note the two additional items in a Home Visitor CDA® candidate *Professional Portfolio* are:

1. A signed *Parent Observation Permission Form* for the candidate to conduct the observation in the family home (Tab C).
2. A signed *Home Visitor CDA® Assessor Recommendation Form* in a sealed envelope (Tab D). Please open the envelope, read the recommendation, and record the Assessor's rating on the CSI form in the notes section on page CSI-22 of the CSI. Please see the example on the next page.

Optional Notes: PROFESSIONALISM (Items 13.1, 13.2, 13.3, 13.4)

Review Notes

Assessor's recommendation is [1, 2, or 3].

Observe Notes

At the end of the review of the candidate's portfolio, you will need to keep the *Parent Observation Permission Form* and the *Home Visitor CDA® Assessor Recommendation Form*.

Please review Sections 3.7, 3.8, 3.9, 4.0, 4.1, 4.2, 4.3, 4.4, and 4.5 of this manual for more details on the review process.

Home Visitor Resource Collection Items

A home visitor CDA® candidate must have evidence of the following items in their *Resource Collection*:

- First Aid and Infant/Child CPR course
- Weekly plan for home visits
- Summary of legal requirements: child abuse and neglect
- Learning experiences (focus on home visitor's work with families)
- Family Resources Guide
- Sample of a family plan
- State or federal policy information related to home based programs
- List of two or three early childhood associations
- Information about community mental health services

Please read the *Training Documents Guidelines* on page 47; and *Requirements for Candidate's Reflective Statements of Competence* on page 50 .

If you are reviewing the candidate's portfolio first at a separate location from the observation site, please hold onto the candidate's *CDA® Competency Standards* book until the CDA Verification Visit™ is completed. **Do not return the CDA® Competency Standards book to the candidate with any CSI scoring data at any time during the CDA Verification Visit™.** However, you must return the *CDA® Competency Standards* book to the candidate, after removing the CSI scores, at the end of the reflective dialogue.

At the end of your review, please return the candidate's portfolio but retain the Home Visitor CSI, *CDA® Assessor Recommendation Form*, and *Parent Observation Permission Form*. **Do not take the candidate's portfolio home with you.**

Observe (1-3 hours) in accordance with the home visitation program policies - At the home of one of the families selected from the candidate's caseload.

The purpose of the observation is to document formal evidence of the competency of the CDA® candidate in each of the *13 Functional Areas*. The observation of the candidate must be done at the home of a selected family from the candidate's caseload. Observation times will vary from 1 to 3 hours, in accordance with the candidate's required program hours of home visitation. On the day of the observation, you must:

1. Arrive at the agreed upon home on time, introduce yourself to the candidate and to the parents, and check the candidate's ID.
2. Thank the parent or parents for signing the *Parent Observation Permission Form* (make sure you have the permission from that family).
3. Obtain the candidate's *Home Visitor CDA® Competency Standards* book from the candidate. If you had completed the review of the portfolio before the observation, please bring the candidate's Home Visitor Competency Standards Book with you to the family home to record the observation.
4. Inform the parents that your focus will be observing the candidate's performance and interactions with them and not their home or their belongings.
5. Sit quietly and observe the candidate's interaction with parents using the Home Visitor CSI located at the back of the candidate's *CDA® Competency Standards* book.

If a candidate fails to arrive at the observation site within 15 minutes of the scheduled time, **please contact the PDS team first before recording the visit as a "No Show" in the online Scoring Tool.**

For additional tips for the observation, please visit the *Checklist for the Observation* on page 50.

Reflective Dialogue (1 hour with the candidate in a private area)

The reflective dialogue is the last step in the R.O.R. Model®. The dialogue is approximately 60 minutes and must be conducted in a private space free from interruptions. Please bring the candidate's *CDA® Competency Standards* book with you and remind the candidate to bring their *Professional Portfolio*. The materials you will need for the reflective dialogue are:

- The candidate's partially completed (candidate has completed box A and B) ***CDA Verification Visit™ Reflective Dialogue Worksheet*** in the candidate's *CDA® Competency Standards* book.
- The candidate's *Professional Philosophy Statement* in the candidate's *Professional Portfolio*.

Please review section 4.9 of this manual for the *Reflective Dialogue Process*, as well as the *Agenda for the Reflective Dialogue with a Candidate* on page 83.

At the end of the reflective dialogue with the candidate, please tear out the CSI with your scoring information and return the candidate's CDA® *Competency Standards* book and *Professional Portfolio*. You will have 48 business hours or the candidate's six month deadline, whichever comes first, to enter the candidate's CSI scores in the PDS online *Scoring Tool*. Please do not share any scoring information with the candidate and advise the candidate that they will need to contact the Council for any information. **You will need to hold onto the candidate's Pre-Verification Visit Checklist interview form, the CSI, the Parent Observation Permission Form, and the Home Visitor CDA® Assessor Recommendation Form for 6 months.** After 6 months, please shred all the above documents in order to maintain the candidate's privacy.

Entering Candidate Scores

When entering the scores in the online *Scoring Tool*, please use this tool as a template **only**. Enter your scores and notes according to the *Item Numbers* on the paper *Comprehensive Scoring Instrument* (CSI) you completed during the CDA Verification Visit™. Although the wording in the online *Scoring Tool* will be different from the home visitor CSI, candidate scores will be evaluated based on the Home Visitor CDA® setting requirements.

CDA PD Specialist™ Performance Evaluation

8.1 Quality Assurance

The Council *Quality Assurance System* is based on a set of standards that ensures CDA PD Specialists™ are supported by success. This system provides a consistent level of excellence in the field that upholds the Council's high standards of excellence. Interrelated elements of the *Quality Assurance System* are quality control and quality improvement.

Quality control is a set of activities intended to ensure that quality requirements are consistently being met. This is achieved by:

- Monitoring the day-to-day interactions, systems, and processes, analyzing Council data reports and listening to field feedback to identify and resolve potential issues.
- Maintaining a focus on CDA PD Specialist™ feedback and challenges to remedy any concerns. Investigating and responding to questions and inquiries, addressing identified violations through Council policy, providing technical assistance, retraining or consequential actions.

It is understandable and expected that as the CDA Professional Development (PD) Specialist™ begins serving in this role, minor infractions may arise when the CDA PD Specialist™ initially engages and assesses candidates. All such CDA PD Specialist™ performance infractions are promptly addressed depending on their unique situation and set of circumstances.

PDS staff follow steps to research each situation:

Step A: Contact CDA PD Specialist™ to reinforce basic policy and procedures

Step B: Contact CDA PD Specialist™ to research CDA PD Specialist™ actions

Step C: Contact CDA PD Specialist™ to share complaint, initiate investigation

Please see a list of *Quality Assurance Guidelines* the Council adheres to on page 113.

Quality improvement for the CDA PD Specialist™ System is necessary to enhance the Council's ability to meet the highest levels of standards, exceed requirements and develop a level of continuous improvement. To achieve this objective, we strive to do the following:

- Implement enhancements and improvements such as:
 - Training module updates and current additions
 - Monitoring the *PDS Portal Resource Library* enhancements
 - Expanding the use of experts in the field
 - Expand the opportunities to engage with our CDA PD Specialists™

8.2 Inquiry and Investigation

It may become necessary that the circumstances of a CDA Verification Visit™ require further examination by the Council. The examination does not automatically imply there was any wrongdoing on the part of anyone associated with the visit. Often it is necessary to verify reportings. For this purpose, the Council requests retention of all *Pre-Verification Visit Checklists* and CSI forms for a minimum of **six months**. We reserve the right to request your CSI forms and *Pre-Verification Visit Checklists* at any time as a part of our quality assurance process.

Conclusion

We hope you find this manual useful as you fulfill your responsibilities as CDA PD Specialists™. It is designed to address the day-to-day tasks and procedures of CDA PD Specialist™ and answer frequently asked questions that come about during the work. Please refer to this manual at all times as your first resource for information. However, for those occurrences not covered in the manual, or for more clarity on a particular topic, please do not hesitate to contact the Council's PDS Team. The phone number is 800-424-4310. You can also contact the team by email at pds@cdacouncil.org.

The service you provide on behalf of the Council is very essential as we strive to maintain the integrity and quality in delivering early care and education throughout the country. Council staff has made every effort to ensure you have the support you need to do your important work. We will continue to develop and provide the tools that guarantee success in your roles.

Thank you for your professionalism and willingness to serve! We wish you the best in all you do and look forward to working with you for many years to come.

Helpful Documents

The following documents are provided as learning tools and on-going references for you when preparing to serve in the role of CDA PD Specialist™ while supporting CDA® candidates and conducting CDA Verification Visits™. Official forms are in **bold**. The documents included are:

• CDA PD Specialists™ Standards of Practice.....	36
• CDA® Candidate Competency Standards At-A-Glance	37
• Commonly Used Terms and Definitions	38
• Summary of the CDA® Assessment System	40
• CDA PD Specialist™ Pre-Verification Visit Checklist	42
• Settings and Minimum Attendance for CDA Verification Visits™	43
• CDA® Credential Settings	44
• My CDA® Professional Portfolio	46
• Training Documents Guidelines	47
• Summary of My CDA® Education.....	48
• Family Questionnaires Summary Sheet.....	49
• Requirements for Candidates Reflective Statements of Competence.....	50
• Checklist for the Observation	50
• Agenda for the Reflective Dialogue with a CDA® Candidate	52
• Facilitating a CDA Verification Visit™ for Monolingual and Bilingual Candidates	54
• Comprehensive Scoring Instrument.....	57
• CDA Verification Visit™ Reflective Dialogue Worksheet	99
• For Home Visitor CDA PD Specialists™	81
o My CDA® Professional Portfolio	81
o Summary of My CDA® Education	82
o Agenda for the Reflective Dialogue with a Home Visitor CDA® Candidate	83
o Parent Observation Permission Form.....	85
o Home Visitor CDA® Assessor Recommendation Form	86
o Home Visitor CDA® Comprehensive Scoring Instrument	87
o CDA Verification Visit™ Reflective Dialogue Worksheet	111
• Quality Assurance Guidelines	113
• CDA Professional Development Specialist™ Contract	114

You are strongly encouraged to frequently access the *Resource Library* in the *PDS Portal* to download all additional support resources not included in this manual.

Any questions or concerns? Please reach out to your CDA PD Specialist™ System Team at pds@cdacouncil.org or at 800-424-4310.

Performance Standard 1:

Professional Knowledge – The CDA PD Specialist™ demonstrates an understanding of the CDA PD Specialist™ Contract, the candidate assessment system, the CDA Verification Visit™ requirements, the R.O.R. Model® process, and the roles and responsibilities of the CDA PD Specialist™.

Performance Standard 2:

Assessment Planning – The CDA PD Specialist™ prepares for each CDA Verification Visit™ using the candidates' setting CDA® Competency Standards, the *Pre-Verification Visit Checklist*, Council policy and procedures, and the *CDA PD Specialist™ Procedures Manual*, as well as contacting the Council's CDA PD Specialist™ System Team when needed.

Performance Standard 3:

CDA Verification Visit™ Delivery – The CDA PD Specialist™ systematically delivers the Council's R.O.R. Model® methodology. R.O.R. Model® offers a **review** of all candidate materials prepared for the assessment, **observation** of the candidate's work with young children in their respective setting, and facilitates a **reflective dialogue**. The candidate's CDA Verification Visit™ meets completion within a 7-day assessment window.

Performance Standard 4:

Professional Development Practice – The CDA PD Specialist™ effectively engages the candidate in professional development experiences. The engagement happens by using Council system policies, processes and a variety of support strategies to provide a respectful, positive, safe, and professional assessment atmosphere that is conducive to professional growth.

Performance Standard 5:

Assessment Submission – The CDA PD Specialist™ submits individual candidate assessment data using the *PDS Portal*.

Performance Standard 6:

Professionalism – The CDA PD Specialist™ maintains a commitment to ethical professional behavior. Through recognized quality performance, the CDA PD Specialist™ communicates efficiently and accurately all communications with candidates, Council staff, other assessment stakeholders, and colleagues. The CDA PD Specialist™ also takes responsibility for and participates in professional growth resulting in continuous improvement of skills and knowledge.

CDA® Competency Standards At-A-Glance

Competency Standard	Functional Area	Definitions
I. To establish and maintain a safe, healthy learning environment	1. Safe	Candidate provides a safe environment and teaches children safe practices to prevent and reduce injuries.
	2. Healthy	Candidate provides an environment that promotes health and prevents illness, and teaches children about good nutrition and practices that promote wellness.
	3. Learning Environment	Candidate organizes and uses relationships, the physical space, materials, daily schedule, and routines to create a secure, interesting, and enjoyable environment that promotes engagement, play, exploration, and learning of all children including children with special needs.
II. To advance physical and intellectual competence	4. Physical	Candidate uses a variety of developmentally appropriate equipment, learning experiences and teaching strategies to promote the physical development (fine motor and gross motor) of all children.
	5. Cognitive	Candidate uses a variety of developmentally appropriate learning experiences and teaching strategies to promote curiosity, reasoning, and problem solving and to lay the foundation for all later learning. Candidate implements curriculum that promotes children's learning of important mathematics, science, technology, social studies and other content goals.
	6. Communication	Candidate uses a variety of developmentally appropriate learning experiences and teaching strategies to promote children's language and early literacy learning, and help them communicate their thoughts and feelings verbally and non-verbally. Candidate helps dual-language learners make progress in understanding and speaking both English and their home language.
	7. Creative	Candidate uses a variety of developmentally appropriate learning experiences and teaching strategies for children to explore music, movement, and the visual arts, and to develop and express their individual creative abilities.
III. To support social and emotional development and to provide positive guidance	8. Self	Candidate develops a warm, positive, supportive, and responsive relationship with each child, and helps each child learn about and take pride in his or her individual and cultural identity.
	9. Social	Candidate helps each child function effectively in the group, learn to express feelings, acquire social skills, and make friends, and promotes mutual respect among children and adults.
	10. Guidance	Candidate provides a supportive environment and uses effective strategies to promote children's self-regulation and support acceptable behaviors, and effectively intervenes for children with persistent challenging behaviors.
IV. To establish positive and productive relationships with families	11. Families	Candidate establishes a positive, responsive, and cooperative relationship with each child's family, engages in two-way communication with families, encourages their involvement in the program, and supports the child's relationship with his or her family.
V. To ensure a well-run, purposeful program that is responsive to participant needs	12. Program Management	Candidate is a manager who uses observation, documentation, and planning to support children's development and learning and to ensure effective operation of the classroom or group. The candidate is a competent organizer, planner, record keeper, communicator, and a cooperative co-worker.
VI. To maintain a commitment to professionalism	13. Professionalism	Candidate makes decisions based on knowledge of research-based early childhood practices, promotes high-quality in child care services, and takes advantage of opportunities to improve knowledge and competence, both for personal and professional growth and for the benefit of children and families.

Commonly Used Terms & Definitions

CDA Competency Standards book

This book is available in each of the four CDA® Credential settings, Preschool, Infant-Toddler, Family Child Care and Home Visitor. All candidates are required to purchase their own copy of the *CDA® Competency Standards* book and bring it to the CDA Verification Visit™. CDA PD Specialists™ will use the *Comprehensive Scoring Instrument* located at the end of the book to write notes and scores during the CDA Verification Visit™.

CDA PD Specialist™ Identification Number

CDA PD Specialists™ who successfully complete the CDA PD Specialist™ training receive an official Identification Number (ID #) from the Council. The CDA PD Specialist™ provides their unique ID# to the candidate only when they have agreed to conduct the CDA Verification Visit™. The candidate must enter the CDA PD Specialists ID# on the CDA® application.

Note: The CDA PD Specialist™ ID number is required for the candidate to complete and submit the CDA® application.

CDA Verification Visit

A requirement of the CDA® credentialing process, that is conducted by the CDA PD Specialist™. During the visit the CDA PD Specialist™ will:

- Review the contents of the candidate's *Professional Portfolio*, training transcripts/certificates, and Family Questionnaires
- Observe the candidate working with children
- Reflect with the candidate, focusing on your areas of strength or growth found in the portfolio or seen during the observation

Comprehensive Scoring Instrument (CSI)

The official form used by the CDA PD Specialist™ to ascertain and record the recommended scores of the candidate in the *13 Functional Areas* using the candidate's *Professional Portfolio* and a direct observation of him/her working with children.

Conflict of Interest

A relationship that may interfere with a CDA PD Specialist's™ ability to be objective in assessing a candidate. Relationships with candidates that are unacceptable for serving in the CDA PD Specialist™ role:

- You are the candidate's relative.
- You are the candidate's current direct supervisor.
- You are the candidate's former direct supervisor within the past 3 years.
- You are the candidate's co-worker in same group or classroom.
- You have a child in the candidate's class or group.
- You have served as the candidate's CDA PD Specialist™ for another CDA® credential.
- You have served as the candidate's CDA PD Specialist™ and the candidate is re-applying for the same credential.

Note: Photocopies of this book and/or its pages is unacceptable.

Find-a-PD Specialist Online Directory

A database for candidates to use to locate a CDA PD Specialist™ in their area to conduct the CDA Verification Visit™.

To use the *Find-A-PD Specialist Online Directory*, candidates enter their work zip code, their classroom setting and the language in which they teach into the database. The database will generate your name and description based on the profile you created in the *PDS Portal*. The candidate then selects the nearest

CDA PD Specialist™ that meets the criteria for their credential type, and sends a request to the specialist to conduct their CDA Verification Visit™. If you are available to complete the CDA Verification Visit™, you must respond to the candidate within 48 hours and provide your CDA PD Specialist™ ID number.

PDS Portal

An online database created for approved CDA PD Specialists™ to access resources, update their online profile, review training, check to see if a candidate is ready to schedule and submit scores from the CDA Verification Visit™ to the Council.

Pre-Verification Visit Checklist

A document used to assist CDA PD Specialists™ in properly preparing for the CDA Verification Visit™, including verifying the candidate's name, setting type, language and location. (Review the checklist on page 42 of this manual.)

Professional Portfolio

The collection of documentation of the candidate's ability to meet all CDA® eligibility requirements. The portfolio also provides the compilation of the candidate's reflections on how his/her practice meets the CDA® *Competency Standards*. The portfolio consists of:

- Divider/cover sheets (3)
- Official training documentation
- Family Questionnaires
- Reflective Statements of Competence (6)
- Resource Collection (23)
- Reflective Professional Philosophy Statement
- Parent Observation Permission Form (**Home Visitor CDA® candidates only**)
- CDA® Assessor Recommendation Form (**Home Visitor CDA® candidates only**)

R.O.R. Model®

"R.O.R." stands for Review-Observe-Reflect™, the model used to structure the tasks undertaken by the CDA PD Specialist™ during the CDA Verification Visit™ that contribute to the assessment of candidate competency. The CDA PD Specialist™ will review the candidate's *Professional Portfolio*, observe the candidate working with children or families and reflect with the candidate on his/her professional strengths and opportunities for growth.

Ready to Schedule Notice

The email or paper notice candidate's receive from the Council after their CDA® application and assessment fee have been successfully processed. Once the *Ready to Schedule* notice has been received, the candidate will appear in the online *Scoring Tool* and the CDA PD Specialist™ is then authorized to schedule and conduct the CDA Verification Visit™.

Reflective Dialogue

The conversation between the candidate and CDA PD Specialist™ at the conclusion of the CDA Verification Visit™ in which the candidate reflects on his/her areas of strength and areas for professional growth for the purpose of setting professional goals. The reflective dialogue is not scored and therefore has no bearing on the award of the CDA® Credential.

Scoring Tool

An application located in the online *PDS Portal* and used exclusively by CDA PD Specialists™ to view candidates who are ready to schedule, verify candidate setting types and submit scores from the CDA Verification Visit™ to the Council.

Summary of the CDA® Assessment System

The Child Development Associate® (CDA) Credential™ represents the crossroad where the candidate's education and experience meet. Renowned as the “Best 1st Step”, the CDA® assessment system is a self-paced, candidate driven professional development process.

Overview

1. PREPARE: In preparation to earn their CDA® Credential, every CDA® candidate must ensure that they meet specific requirements and complete the necessary pre-requisites as presented in all CDA® *Competency Standards* books:

- A high school diploma, GED, or enrolled in a high school career and technical program.
- 120 hours of ECE equaling no fewer than 10 training hours in each of the 8 CDA® subject areas appropriate for the age level credential. While formal education hours can be for credit or noncredit, they must be earned through an agency or organization with expertise in early childhood teacher preparation. The agency or organization must verify the candidate's education in the form of an official transcript, certificate, or letter.
- 480 hours of work experience, appropriate for the age level credential, accumulated in the previous 3 years.
- Family Questionnaire collection from the families of the children in care.
- *Professional Portfolio* adhering to the guidelines in the appropriate age-level and credential setting CDA® *Competency Standards* book.
- Acquires permission from their Program Administrator/Director to conduct their individual CDA Verification Visit™ on-site while working with young children as a lead teacher.
- Locates a Council endorsed, CDA Professional Development Specialist™, agrees to conduct the on-site CDA Verification Visit™ using the R.O.R. Model®.

Preparation

Each candidate handles purchasing a personal copy of age-level and setting based credential book. The book includes everything the candidate need to prepare and apply for the CDA® Credential. The CDA® Competency Standards book contains complete information on the credential process. The CDA® Competency Standards and all of the forms the candidate uses, including application, Family Questionnaire, and the official Comprehensive Scoring Instrument (the Observation Tool) utilized by the CDA Professional Development Specialist™. The candidate handles bringing this to the CDA Verification Visit™.

2. APPLY: When applying for the CDA® Credential, every CDA® candidate follows a streamlined process:

- Completes the CDA® application (online recommendation)
 - o Confirm eligibility
 - o Confirm prerequisites completed

- o Select English or Spanish as preferred language for the CDA® Exam
- Locates a Council endorsed CDA PD Specialist™ and acquires their agreement to serve as their CDA PD Specialist™.
- Provide ID number of CDA PD Specialist™.
- Acquires permission from their program administrator/director to conduct their individual CDA Verification Visit™ on site while working with young children as a lead teacher.
- Obtain program director's signature
- Assessment fee payment
- Application reviewed and approved
- Waits to receive the *Ready to Schedule* (R2S) notice from the Council before beginning the process of the CDA Verification Visit™.

Application

(NOTE: Each candidate is solely responsible for submitting a complete application & paying the fee.)

- Receive the *Ready to Schedule* notice and informs the CDA PD Specialist™
- Schedules the date and time of CDA Verification Visit™ in agreement with the CDA PD Specialist™
- Schedules appointment to take the CDA® Exam at a Pearson VUE testing center.

3. DEMONSTRATE: In demonstrating their competency as an educator and caregiver of young children, every CDA® candidate must complete their assessment by:

- **CDA Verification Visit™ with a CDA Professional Development Specialist™**
 - o Review of documents prepared in step 1 above
 - o Observation of candidate in a classroom or home setting
 - o Reflective dialogue
- CDA® Exam at a Pearson VUE Test Center.
- Both completed in any sequence but before the candidates six-month deadline

Demonstration

(NOTE: Each candidate must be observed working as the lead teacher in the age group and setting recorded on the candidate's application)

4. EARN

- Scores electronically submitted to the Council by CDA PD Specialist™ and Pearson VUE
- Credentialing decision

CDA PD Specialist™ Pre-Verification Visit Checklist

Please retain for six months from the time of CDA Verification Visit™.

Prior to the CDA Verification Visit™, the CDA Professional Development Specialist™ must use this *Pre-Verification Visit Checklist* when contacting the CDA® candidate to screen and record the required documentation.

This checklist helps to ensure the success of the CDA Verification Visit™, the candidate's proper preparation and ultimately the success of the credentialing process.

- Check your *Scoring Tool* for the candidate's name FIRST before you schedule the CDA Verification Visit™.
- Verify the information below with the candidate's information in your *Scoring Tool*.

Candidate Name:			
Candidate Phone Number:			
Date Ready to Schedule Notice was received:			
CDA Verification Visit™ City/State:			
Program Name:			
Program Address:			
Program Phone Numbers:			
Director's Name:			
Ages of children enrolled in class/group/home:			
Setting Type:	Preschool (Green) __ Infant/Toddler (Yellow) __ Family Child Care (Blue) __ Home Visitor (Purple) __. <i>(Verify the setting with the color of the candidate's CDA® Competency Standards book. Contact the PDS team if the candidate does not have the CDA® Competency Standards book matching his or her setting.)</i>		
Language of Assessment Language Specialization (if applicable)	English _____ Bilingual (English and Spanish) _____ Other Bilingual (English and _____)	Monolingual Spanish _____ Monolingual _____ (Please indicate other language)	
Verify that the candidate will be in the Lead Teacher Role during the CDA Verification Visit™			
Required Items		A check mark indicates that the candidate confirms an understanding of these items required for the VV.	
1. Candidate's Picture ID <i>(Note: verify when you arrive)</i>			
2. Competency Standards book: <i>(Note: Remind them to bring an ORIGINAL COPY on the day of the CDA Verification Visit™)</i>			
3. Professional Portfolio <i>(Note: Remind them to bring on the day of the CDA Verification Visit™)</i> Please ensure that the candidate has the following <i>Professional Portfolio</i> contents: Current First Aid & Infant CPR; Documentation verifying completion of 120 hours of formal education; My CDA® Professional Portfolio Checklist; Family Questionnaires Summary Sheet; Reflective Dialogue Worksheet with "Areas of Strength" and "Areas of Growth completed. [For Home Visitors only: CDA® Assessor's Recommendation Form; Parent Observation Form]			
CDA Verification Visit™ Schedule	(R)evue Date & Time:	(O)bservation Date & Time:	(R)eflection Date & Time:

Settings and Minimum Attendance for CDA Verification Visits™

Other Confirmations

- Confirm there are no program-wide events that impact the VV process.
- Confirm the program director is fully aware of and has approved your visit when you contacted him or her.
- Confirm there is a private meeting space set aside for the Reflective Dialogue.
- Confirm the minimum number of children that attend.
- **For Home Visitors Verification Visit only:** Confirm visit with one family from caseload.

Settings and Minimum Attendance for CDA Verification Visits™

SETTING	AGES	PROGRAM ENROLLMENT	VV ATTENDANCE	# OF CAREGIVERS
*Center-Based Preschool	3 years through 5 years old	10	It is required a minimum of 8 children ages 3-5 during observation	2
*Center-Based Infant-Toddler	Birth through 36 Months. Includes 3 Sub-Groups: <ul style="list-style-type: none"> • Young Infants: 0-8 months • Mobile Infants: 9-17months • Toddlers: 18-36 Months 	***10	It is required a minimum of 3 children of any age within sub-groups (birth to 36 months).	2
*Home-Based Family Child Care	Birth through 5 Years	Per state licensing	It requires a minimum of 2 children from any age from birth to 5 years old, not related to the candidate.	According to license
*Home Visitor	Families with children birth through 5 years	Candidate has to have a caseload of at least 4 families	Visit to one family from candidate's caseload. Signed <i>Parent Observation Permission Form</i> is required.	N/A

* State-approved child development center

State-approved family child care home (Family child care settings are also eligible in localities where there is 'no' regulations of family child care.)

*** Not necessarily in the candidate's group

After you verify the information with the candidate, you must then verify that the information matches your *Scoring Tool*. If you encounter any problems or concerns, you need to contact the Council's PDS Team and you should not conduct the CDA Verification Visit™ until PDS Team resolves concerns and notifies you.

Candidates applying for the CDA® Credential must be observed working in a “setting” that meets the following criteria: (NOTE: Candidates may be employed or work on a volunteer basis in the child care setting.)

CENTER BASED SETTING

Preschool Center Based setting is a state-approved child development center where a candidate can be observed working with a group of at least eight children, all of whom are ages 3 to 5 years. In addition, a center-based program must have: 1) at least 10 children enrolled in the program (not necessarily in the candidate’s group); and (2) at least two caregivers working with the children on a regular basis.

Infant-Toddler Center Based setting is a state-approved child development center where a candidate can be observed working with a group of at least three children, all of whom are aged birth through 36 months. A candidate may work/be observed with all sub-groups or with one or two sub-groups*). In addition, a center-based program must have: 1) at least 10 children enrolled in the program (not necessarily in the candidate’s group); and (2) at least two caregivers working with the children on a regular basis.

FAMILY CHILD CARE SETTING

A **Family Child Care** setting is a family child care home where a candidate can be observed working with at least two children 5 years old or younger who are not related to the candidate by blood or marriage. The setting must meet at least the minimum level of applicable state and/or local regulations. Family Child Care settings are also eligible in localities where there is no regulation of family child care.

HOME VISITOR SETTING

A **Home Visitor** setting is an established program of Home visits (to families with children 5 years old or younger) that supports parents in meeting the needs of their young children, and where candidates can be observed conducting home visits. In this setting, regular home visits are the primary methods of program delivery.



BILINGUAL SETTING

(Required for candidates who apply for Bilingual Specialization)

A **Bilingual** setting is a child development program that has specific goals for achieving bilingual development in children; where two languages are consistently used in daily experiences and activities; and where parents are helped to understand the goals and support children’s dual language learning.

SPECIAL EDUCATION SETTING

A **“Special Education”** child development setting – one designed to serve children with moderate to severe special needs – does qualify as an eligible setting for CDA® assessment.

The *CDA® Competency Standards* address the skills that early childhood educators need for this population of children. The program must meet the other criteria described above for a Preschool, Infant/Toddler, or Family Child Care setting. The chronological ages of the children with special needs also must match the age groups specified for each setting.

NOTE: Drop in programs and before and after school programs are not eligible settings where a candidate can prove his or her competence around the *CDA® Competency Standards* including all Functional Areas.

INFANT-TODDLER ENDORSEMENT SUB-GROUPS

In order to demonstrate competence with the complete Infant-Toddler age range, a candidate applying for a CDA® Credential with Infant-Toddler endorsement must:

- Be observed by the CDA Professional Development Specialist™ working in his/her classroom with any or all of the three Infant-Toddler sub-groups.

Young Infants
(Birth - 8 months)

Mobile Infants
(9 - 17 months)

Toddlers
(18 - 36 months)

- Complete *Professional Portfolio* according to Infant-Toddler requirements (see pages 13-20), including those specific resources embedded in the *Resource Collection* and *Reflective Statements of Competence* that will allow the candidate to demonstrate his or her competence with all sub-groups.

The following are key requirements a CDA PD Specialist™ must meet and comply with as well as verify in initial contact with a candidate:

1. The CDA PD Specialist™ must have the training and experience specifically focused on the candidate's particular credential.
2. The candidate's *Professional Portfolio* must address all developmental age groupings in their *Reflective Competency Statements* and *Resource Collection* of specific items.
3. If the candidate is applying for a bilingual credential in Spanish,
 - a. The candidate's program MUST operate using both languages in its daily operations with children and families;
 - b. The candidate must be fluent in both languages.
 - c. The CDA PD Specialist™ must be proficient in both languages (able to speak, read and write English and Spanish) and understand and be understood by both children and adults. The CDA PD Specialist™ is required to be vetted by the Council PDS Team to verify this competency and appropriately posted to the *Find-a-PD Specialist Online Directory*.
 - d. The candidate's *Professional Portfolio* must be compiled to represent the bilingual requirements in the candidate's *CDA® Competency Standards* book.



Indicates a required example for candidates seeking bilingual specialization



MY CDA Professional Portfolio

Overview of Section Tabs

Candidate Name

Candidate ID Number

Use the following checklist to organize your *Professional Portfolio* in the order listed below. You may check off each item in the last column as it is completed. Use this “My CDA Professional Portfolio” sheet as the cover sheet inside your Portfolio. Please see pp. 12-19 for a detailed explanation.

TAB	REQUIRED PORTFOLIO ITEM		✓
	“My CDA Professional Portfolio” cover sheet (this document)		
A	“Summary of My CDA Education” cover sheet followed by all relevant training transcripts, certificates and official documentation		
B	“Family Questionnaires” cover sheet followed by all completed, returned Family Questionnaires		
C	Reflective Competency Statement I	CS I, including paragraphs CS I a, CS I b, CS I c	
	CS I Resource Collection Items	RC I-1, RC I-2, RC I-3	
D	Reflective Competency Statement II	CS II, including paragraphs CS II a, CS II b, CS II c, CS II d	
	CS II Resource Collection	RC II-1 through RC II-9	
E	Reflective Competency Statement III	CS III, including paragraphs CS III a, CS III b	
	CS III Resource Collection	RC III	
F	Reflective Competency Statement IV	CS IV, including paragraphs CS IV a, CS IV b, CS IV c	
	CS IV Resource Collection Items	RC IV-1 through RC IV-4	
G	Reflective Competency Statement V	CS V, including paragraph CS V a	
	CS V Resource Collection Items	RC V	
H	Reflective Competency Statement VI	CS VI, including paragraphs CS VI a, CS VI b	
	CS VI Resource Collection Items	RC VI-1, RC VI-2, RC VI-3	
I	Professional Philosophy Statement		

I attest that the following *Professional Portfolio* includes *Resource Collection* items that I gathered, myself, as well as original Statements written by me that reflect my work with the children and families in my care.

Candidate Signature

Date

Training Documents Guidelines

When reviewing the candidate's educational documentation, you should review the ***"Summary of My CDA® Education"*** checklist to conduct the initial verification. The Summary is in the *CDA® Competency Standards* book and on the next page in this manual. Please utilize this checklist to ensure that the candidate has a minimum of **120 hours, with 10 hours in each of the eight CDA® Subject Areas**.

The training documents should meet the following guidelines:

- Training documentation is being provided by a training organization, not an individual trainer.
- Training documentation is on official letterhead from the training organization.
- Training documentation offered in the form of a letter must include a handwritten signature. Electronic signatures are **not** acceptable.
- **Electronic signatures are only acceptable for CDA® certificates earned online.**
- Training documentation must include the number of clocked hours, content area, date of training/course and name and address of the training organization.
- Training must be completed before the CDA Verification Visit™.
- **Training offered at conferences or from individual consultants is not acceptable.**
- Training content must be relevant and directly apply to the age group/setting of the CDA Verification Visit™, for example, Infant/Toddler; *the training must reflect content covered for the ages in this setting.*
- Training documentation should not appear altered in any way, such as vital information that is crossed over with correction fluid and one agency verifying another agency.
- Training logs are not acceptable as training documentation. Training logs are not official documents since they do not meet the criteria stated above.
- ***Pending Council approval, transcripts from a state registry system may be accepted. An approved list of states is in the PDS Portal Resource Library.***

1 quarter hour = 10 clock hours

1 semester hour = 15 clock hours

1 CEU= 10 clock hours

Please Note: If you determine that any of the documentation does not meet these criteria, you must document what appears, incorrect or missing. This should be indicated in the last blue section of the *Comprehensive Scoring Instrument (CSI)*.

After the CDA Verification Visit™, submit this information to the Council along with your scores.



Summary of My CDA Education

Candidate Name

Note to Candidate: Please use this summary document as the cover sheet to your “education documentation”; the collection of transcripts, letters, certificates, etc. that you will place in your *Professional Portfolio* to document how you met the educational requirements for the CDA Credential™. At your CDA Verification Visit™, your CDA Professional Development Specialist™ will review this sheet to ensure that it accurately reflects your education documentation that follows. Please see p. 11 for a detailed explanation of acceptable professional education.

Statements of CDA Education Completion:

I attest to completing the required 10 hours of education in each of the following CDA Subject Areas.

CDA Subject Areas	Please initial below
1. Planning a safe, healthy learning environment	
2. Advancing children’s physical and intellectual development	
3. Supporting children’s social and emotional development	
4. Building productive relationships with families	
5. Managing an effective program	
6. Maintaining a commitment to professionalism	
7. Observing and recording children’s behavior	
8. Understanding principles of child development and learning	

I attest to the accuracy of the above Statements of Completion: that I completed at least 10 clock hours of professional education in each of the 8 CDA Subject Areas. I also attest that I have met or exceeded 120 total clock hours of CDA-related professional education.

Candidate Signature

Date



Family Questionnaires Summary Sheet

Candidate Name

Candidate ID Number

Once you have distributed and collected your Family Questionnaires, place them behind Tab B in your *Professional Portfolio*. Complete this Summary Sheet and put it in front of the completed questionnaires.

1. I distributed _____ Family Questionnaires.
2. I collected _____ Family Questionnaires and placed them behind this Summary sheet. Therefore, I collected the “majority” (more than half) of the Questionnaires I distributed.
3. I have looked for patterns or trends of feedback from these Questionnaires. Upon reflection, I think some of the families see the following as my greatest professional strength(s) and area(s) for professional growth:

Area(s) of Strength (list at least one)

Area(s) for Professional Growth (list at least one)

4. I have taken the areas of strength and growth that I wrote, above, and entered them into Boxes A and B in my Reflective Dialogue Worksheet at the end of this book.

Note to the CDA PD Specialist™:

Please do not read the contents of the Family Questionnaires found behind this Summary Sheet. This feedback is private, between this candidate and the families she/he serves. Simply count the Questionnaires and verify that the number of questionnaires behind this Summary sheet matches the number written in #2, above. If the number matches, consider this required task complete. If the number does not match record this information in Item 13.4 of the *Comprehensive Scoring Instrument*.

Requirements for Candidate's Reflective Statements of Competence

Every candidate is required to compose personal *Reflective Competency Statements* for each of the six (6) Competency Goals using specific directions explained in the candidate's *CDA® Competency Standards* book for their particular setting type. The candidate prepares six written reflections on his/her teaching practices that speak to the particular Competency Goal. Please review the following guidelines:

- One statement for each of the six (6) Competency Goals
- Each statement should be legible and readable
- Each statement should be 200-500 words in length (Approximately two typed pages)
- Reflective Statements about each Competency Goal should begin with a paragraph describing how the candidate's teaching practices meet the Standard. (Note: Alternatively, candidates may also choose to write one paragraph for each Functional Area)
- Address all functional areas within each Competency Goal
- Candidates must write the statements themselves using their own words
- Include all the required information unique to each *Reflective Competency Statement* as stated in the *CDA® Competency Standards* book (pages 15-17)
- The content must reflect the setting and age group of the credential the candidate is working to earn.

Checklist for the Observation

The purpose of your observation of the CDA® candidate is to document formal evidence of competency in each of the *13 Functional Areas*.

- You need to be familiar with the *13 Functional Areas* and Numbered Items.
- The Numbered Items are specific goals you must keep in mind while observing the candidate in order to collect valid information to record on the CSI.
- Please gather as much information as possible in the 2 hour observation before making your final rating decisions.
- The candidate **MUST** perform as the **lead teacher** during this two-hour observation regardless of whether he/she regularly works as the lead teacher.

Checklist for the Observation continued...

- The CSI tool must be used during the observation session. It is organized into three distinct color-coded sections:
 - o Settings and Activities (ORANGE)
 - o Actions and Interactions (GREEN)
 - o Review (BLUE)
- Be sure to wear comfortable (but professional) clothes, bring spare writing instruments, limit the number of personal items you have with you and use the restroom before you begin.
- Find a comfortable spot in the room to begin your observation, out of the way of activities, from which you can easily see and hear the candidate in action.
- Your two-hour focus on the candidate should never be interrupted. **Do not use your cell phone during this time.**
- As an observer, you are encouraged to remain silent and to be “invisible.” Refrain from interacting with the children or the candidate. If a child asks you what you are doing, you might say “my job is to watch teachers and children play.”
- If the candidate and children move to another room or outdoors, quietly follow them at all times.
- Your tendency may be to focus on a particular event that is occurring. However, remember that you handle gathering a considerable amount of evidence for a limited period. Hold yourself to a steady pace to keep from “getting lost” in wonderful early childhood moments.
- Don’t let the CSI lead your process. Let events that unfold guide your use of the Instrument. In other words, do not just use the CSI as a “checklist,” only observing for Items in the order they are presented in the Instrument. Instead, feel free to move back and forth between Indicators, Items, and even functional areas, as you find instances of the candidate’s competencies occurring around you, from moment to moment.
- Record all notes on the candidates CSI tool and protect its confidential information.
- Finally, remove the CSI form from the candidate’s book and take it with you. You will read it to record the scores online in the *Scoring Tool*.

Note: A CDA PD Specialist™ may not change or propose a change of setting for the candidate’s observation.

Agenda for the Reflective Dialogue with a CDA® Candidate

Welcome & Clarifications (Approx. 5 min.)

Welcome

- As the CDA PD Specialist™, you will begin the session by welcoming the candidate and reviewing the agenda, stating expectations and goals by saying “We are spending 50-60 minutes together. My role is to assist you as you reflect on your continuing professional growth and set new goals for yourself.”

Clarifications (optional) (Approx. 10 min.)

- You will use this time to ask questions regarding any items in the CDA® Comprehensive Scoring Instrument that may still need clarification after the Materials Review. (i.e., “I was not able to read anything about Nap Time. How do you make sure that it is ‘a pleasant rest time for all children’?” or “I was not able to read anything about how you facilitate meal times. Tell me about how you ‘facilitate appropriate mealtime experiences.’”

Reflective Dialogue Introduction, Professional Philosophy Statement (10 min.)

Reflective Dialogue Introduction

- You will introduce the Reflective Dialogue by explaining that:
 - There is no scoring for the Reflective Dialogue.
 - There are no “right” or “wrong” answers in the discussion you are about to have.

You will ask the candidate to look at the Reflective Dialogue Worksheet. During the Reflective Dialogue, the candidate uses the Worksheet to record important points to remember about areas of professional strength and areas for future professional growth. The candidate refers to the Worksheet at the end of the Dialogue, as he/she sets goals and records possible steps to reach each objective.

Professional Philosophy Statement Review

- You and the candidate will discuss the candidate’s Professional Philosophy statement. To facilitate the conversation, you may ask such questions as:
- “In what ways does your teaching practice reflect your professional philosophy?” or “That is powerful. How do you plan to make your philosophy a reality?”

Candidate Self-Reflection (Approx. 15 min.)

Areas of Professional Strength

- You will lead the candidate through a facilitated self-reflection experience. Potential questions are:
 - “What do you think/believe are your greatest areas of strength as an early childhood professional? How did you develop these areas of strengths?”
 - “How do you think your areas of strength may positively impact the children and families in your care?”

In column 2 box C of the Reflective Dialogue Worksheet, the candidate records what she or he identifies as areas of professional strength.

Areas for Future Professional Growth

- You will continue the facilitated self-reflection conversation. Potential questions are:
 - “What do you think/believe are your greatest areas for future growth as an early childhood professional?”

Agenda for the Reflective Dialogue with a CDA® Candidate continued...

- o “Why do you think this area(s) is more challenging for you than the areas you mentioned as strengths?”
- o “How do you think working in these areas for growth may positively impact the children and families in your care?”

In column 2 box D of the Reflective Dialogue Worksheet, the candidate records what he or she identifies as areas for future professional growth.

CDA PD Specialist™ Feedback (Approx. 15 min.)

One Area of Professional Strength

- In this area, you will offer perspective gleaned from the Review of the *Professional Portfolio*. Potential questions are:
 - o “Having reviewed your *Professional Portfolio* and observed you working with children, here is the greatest area of professional strength I documented.”
 - o “How did you develop this strength?”
 - o “How do you think this strength may positively impact the children and families in your care?”

One Area for Future Professional Growth

- You should offer future growth strategies gleaned from the Review of the *Professional Portfolio*. Potential questions are:
 - o “Here is an area for future professional growth that I documented.”
 - o “How might growing in this area positively impact the children and families in your care?”

Goal-Setting & Action-Planning, Close (Approx. 15 min.)

Goal-Setting

- **CDA PD Specialist™:**
 - o “Use the areas of strength and future growth that you’ve identified and written down on your Reflective Dialogue Worksheet. Let’s take some reflective time to identify 1 to 3 professional development goals you might set for yourself to record on the back of this worksheet.”
- (Note: Final goals are determined by the candidate, never by the CDA PD Specialist™.)

Action-Planning

- **CDA PD Specialist™:**
 - o “How will you achieve these goals and by when? Let’s brainstorm some actions you might take and timelines for completion. Then you can write them in the appropriate spaces on your Worksheet.”
- Candidate and CDA PD Specialist™ both sign statements at the bottom of worksheet. (The candidate commits to pursuing goals, the CDA PD Specialist™ signs to witness the candidate’s commitment.)

Close

- **CDA PD Specialist™:**
 - o “Thank you for spending this time in the Reflective Dialogue with me. I hope you found it valuable. The Council would like to encourage you to share your goals with a mentor or your supervisor. They are colleagues who holds you accountable and will support you in successfully achieving your goals as you continue to grow as an early childhood professional.”

Facilitating a CDA Verification Visit™ for a Monolingual Candidate

In addition to meeting all of the standard requirements for earning the CDA® Credential, candidates applying for a Monolingual Language Specialization must satisfy the following conditions.

Demonstrate

The CDA Verification Visit™

The candidate must select a CDA PD Specialist™ who is proficient in the language of the assessment. The Observation must take place in an eligible monolingual setting and must reflect the candidate's work using assessment language daily and consistently. The CDA PD Specialist™ conducts the Reflective Dialogue with the candidate in the language of the assessment.

The CDA® Exam

The CDA® Exam may be taken by all candidates, including Monolingual candidates, in either English or Spanish at a Pearson VUE facility.

Note: If the language of the Specialization is other than Spanish, the candidate must contact the Council to discuss special circumstances before applying for the exam.

Facilitating a CDA Verification Visit™ for a Bilingual Candidate

A bilingual program is a child development program that has specific goals for promoting bilingual development in children. Two languages are consistently used in daily activities to help families understand the goals and support children's bilingual development.

A bilingual candidate is a candidate who works in this type of program and is required to use both languages daily and consistently with children and their families. They can speak, read and write both languages well enough to understand others in both English and the second language.

Since 1979, the CDA® bilingual assessment requirements have been included in the CDA® credentialing process. These conditions exist so that candidates working in bilingual programs can demonstrate their distinctive competencies in meeting the diverse linguistic needs of children by earning the CDA® Credential with a Bilingual Specialization. There are unique, but required bilingual examples of competence that interweaves into 11 of the 13 Functional Areas except "Healthy" and "Physical." The examples, however, are not inclusive. Candidates may think of many additional examples of competent performance for bilingual early childhood professionals.

Candidates seeking Bilingual Specialization are also assessed in their ability to promote and facilitate children's bilingual development through consistent use of both languages in daily activities, as required by the candidate's job in a bilingual program.

Although there is no particular model of bilingual education that a candidate should follow, a competent candidate is knowledgeable about the development of language, bilingual communication and the integration of culture and language. The candidate should have specific strategies for achieving bilingual development and be able to implement them through consistent daily opportunities where children build their first language and culture while learning the second language. These strategies may include programs where children who speak English are learning a second language.

Education Requirements

Candidates applying for Bilingual Language Specialization are required to study Principles of Dual Language Learning as part of their hours of study under Subject Area #2: "Advancing children's physical and intellectual development". In addition to providing verification of completion of 120 clock hours of education in the form of a transcript, certificate or letter, these candidates must include a course description or specific syllabus. It must be pertinent to a Principles of Dual Language Learning course of study.

The Professional Portfolio

In addition to meeting all of the standard requirements for *Professional Portfolios*, Bilingual Language Specialization also requires:

- **Family Questionnaires**
When inviting families to complete the Family Questionnaires, families should be asked to complete all questions, paying particular attention to Question #14, which is specific to bilingual programs.
- **The Resource Collection**
The resources used directly with children and families must be presented in both languages (RC 4, RC 5, RC 6, RC 7)
- **Reflective Statements of Competence**
Three statements in English and three in the other language are required for the six Statements of Competence. Candidates are free to decide which statements to write in English and which ones in the other language. These statements must include information in regards to how candidate applies Principles of Dual Language Learning to her bilingual daily practice with children.
- **Professional Philosophy Statement**
The candidate may write the Professional Philosophy Statement in either language.

Apply

Candidates who wish to apply for a Bilingual Language Specialization may purchase and utilize either the Spanish or English version of the Competency Standards Book. The Spanish version of this book includes an application, the Comprehensive Scoring Instrument, and all resources written in Spanish.

Demonstrate

The CDA Verification Visit™

The candidate must select a CDA PD Specialist™ who has been approved by the Council by the Council to conduct bilingual CDA Verification Visits™ by the Council. The CDA PD Specialist™ conducts the reflective Dialogue with the candidate in both languages.

The Observation

The Observation held during the CDA Verification Visit™, must take place in an eligible bilingual program and must reflect the candidate's work using both languages daily and consistently.

The CDA® Exam

The CDA® Exam is offered in both English and Spanish for all candidates and is taken at a Pearson VUE facility. Candidates applying for a Bilingual Language Specialization of English and a language other than Spanish take the Exam at a Pearson VUE facility in English.

NOTE TO CANDIDATE: Do not write on this Comprehensive Scoring Instrument. Leave blank for your CDA PD Specialist™.



Comprehensive Scoring Instrument

Candidate's Name: _____

Credential Type: ☐ Infant/Toddler ☐ Preschool ☐ Family Child Care

Bilingual Specialization: ☐ Yes ☐ No

Date of Portfolio Review: _____

Date of Observation: _____

Instructions for the CDA Professional Development (PD) Specialist:

The CDA Comprehensive Scoring Instrument (CSI) is the tool you will utilize to determine the competencies of the candidate named above, using multiple sources of evidence:

- (1) the contents of the candidate's *Professional Portfolio*
- (2) your direct observation of the candidate working with young children and
- (3) your skilled perceptions of the care/education environments that the candidate is responsible for designing/maintaining (when applicable)

Structure of the CSI

The CSI was designed to reflect the nationally-recognized CDA Competency Standards, found on p. 40. in this book, that provide a baseline of competencies for all professionals working with, educating and caring for groups of young children.

In order to best elaborate on the key professional practices identified, the Standards in this tool have been arranged according to the following hierarchy:

Functional Area

Item/Item/Item

Indicator

CDA PD Specialists™ are responsible for using the CSI tool to determine and submit to the Council Recommended Scores (1 – 3) at the Item level. In order to assist you in this endeavor, it is recommended that you review and observe at the Indicator level, later using your professional judgment to assign Item scores based on the averages or patterns you have recorded of that Item’s related Indicators.

In order to best determine Indicator scores you may need to consult the various optional examples listed in the Competency Standards section of the book. Please remember that these examples are optional and are provided only for the purposes of illustration. They were not designed to be an inclusive list that every candidate must display in order to be assigned a Recommended Score.

Please also note that the CSI has been designed as a universal tool that can be used for all CDA Credentials™: Preschool, Infant/Toddler and Family Child Care. Indicators must be interpreted using the specific examples listed in the book related to that Credential type (in other words, preschool examples may be different than infant/toddler examples). Additional examples have also been provided and must be taken into consideration for certain Items when reviewing and observing a candidate applying for Bilingual Specialization.

Leave these CSI pages attached to the book during the CDA Verification Visit™ in order to quickly consult the examples for clarification whenever needed.

Use of the CSI

You will rate the candidate on a scale of 1 – 3:

1	2	3
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1 = Little or no evidence

2 = Some evidence

3 = Great deal of evidence

Full instructions for use of the CSI can be accessed by CDA PD Specialists™ in the CDA Professional Development Specialist™ Resource Library. Note: When submitting a score of 1 to the Council online, the CDA PD Specialist™ will be required to add a brief note explaining the rationale and/or examples for that score.

Sections of the CSI

In order to make your use of the tool as efficient as possible during the CDA Verification Visit™, the CSI has been sorted into three color-coded sections:

Settings & Activities

This section includes all of the Items that do not rely on candidate behaviors. In other words, you will be able to assess these Items without the candidate present; by reading the related topics in the candidate's *Professional Portfolio* and/or by looking at the children's environments (spaces, furniture, equipment, materials, etc.) for which the candidate is responsible.

NOTE: If the candidate is not responsible for designing/maintaining the environment(s) in which the Observation occurs, you will need to rely more heavily on the related writings/resources found in her/his Reflective Competency Statement about "Competency Standard I: Safe, Healthy Learning Environments" when reviewing the Portfolio.

Actions & Interactions

This section will be the primary section used during your observation of the candidate working with children (minimum of two hours). All of the Items in this section relate to candidate behaviors; the ways you observe she/he acting and interacting with children.

Review

This section includes all of the Items that are typically unobservable. In order to determine Recommended Scores for each of these Items, you will likely need to rely solely on what you read in the candidate's *Professional Portfolio* during the one-hour Review session.

Final Steps

The final step, once you have completed the Review and Observe sessions using this CSI, is to facilitate the Reflect Session with the candidate. During this session, you may ask questions of clarification to assist you in completing the CSI. You will also discuss the candidate's Professional Philosophy Statement and provide the candidate with your feedback about one "Area of Professional Strength" and one "Area for Professional Growth" based on your review and observation. To prepare, feel free to use the "Reminders to Myself to Prepare for the Reflective Dialogue" sheet found on the last page of this CSI.

Upon completion of the CDA Verification Visit™, you must remove the CSI from this book using the perforations on the inside of each page. You will then return the book to the candidate and take the CSI with you in order to use when you submit this candidate's Recommended Scores to the Council through the Submission Tool in the online PDS Portal.

In order to protect candidate confidentiality, the CDA PD Specialist™ may not share or make copies of the notes or Recommended Scores recorded on the CSI with/for any person, including the candidate. Once the Recommended Scores have been submitted to the Council online, the CDA PD Specialist™ is required to shred or otherwise destroy this CSI tool.

Functional Area 1: **SAFE**

Item 1.1 Environments are safe for all children and adults. (p. 42)

1	2	3
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Indicator:

- a) _____ Materials, equipment and environments are safe

Item 1.2 Well-planned and well-organized emergency procedures and supplies are evident. (p. 43)

1	2	3
---	---	---

Indicators:

- a) _____ Procedures for fires and other emergencies are posted
- b) _____ First-aid supplies and medicines are stored appropriately and accessible to adults only

Optional Notes: **SAFE** (Items 1.1, 1.2 above)

Review Notes	Observe Notes

Functional Area 2: **HEALTHY**

Item 2.1 Children's settings promote good health. (p. 46)

1	2	3
---	---	---

Indicators:

- a) _____ Materials, equipment and environments are clean and promote good health
- b) _____ Disinfecting and sanitizing solutions are present and stored appropriately
- c) _____ Relevant health information from families of children are maintained and posted

Optional Notes: **HEALTHY** (Item 2.1 above)

Review Notes	Observe Notes

Functional Area 3: **LEARNING ENVIRONMENT**

Item 3.1 Environments are developmentally appropriate for young children. (p. 50)

1	2	3
---	---	---

Indicators:

- a) _____ Environments are pleasant, welcoming and provide appropriate levels of stimulation
- b) _____ Environments are arranged and organized intentionally to meet the developmental needs of children

Item 3.2 Developmentally appropriate materials are available. (p. 52)

1	2	3
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Indicators:

- a) _____ Materials are developmentally appropriate for all children
- b) _____ A variety of materials are provided for children to explore
- c) _____ There is a sufficient number of materials to accommodate the group size
- d) _____ Materials are organized and accessible to children throughout the day

Item 3.3 Daily schedule and weekly plan(s) are developmentally appropriate. (p. 53)

1	2	3
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Indicators:

- a) _____ Schedule allows for routine needs of children to be met
- b) _____ Schedule provided meets children's needs for play
- c) _____ Whole group times, when offered, are developmentally appropriate
- d) _____ Weekly Plans provide a variety of developmentally appropriate experiences
- e) _____ Pleasant nap or quiet times meet children's needs for rest

Optional Notes: LEARNING ENVIRONMENT (Items 3.1, 3.2, 3.3 above)

<p>Review Notes</p>	<p>Observe Notes</p>
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Functional Area 4: **PHYSICAL**

Item 4.1 Activities, materials and equipment encourage children of varying abilities to develop their large muscles. (p. 59)

1	2	3
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Indicator:

- a) _____ Gross motor skills are encouraged through developmentally appropriate materials, equipment and indoor/outdoor activities

Item 4.2 Activities and materials encourage children of varying abilities to develop their small muscles. (p. 60)

1	2	3
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Indicator:

- a) _____ Individual fine motor skills are encouraged through a variety of developmentally appropriate materials and activities

Item 4.3 Activities and materials encourage children to develop their senses. (p. 60)

1	2	3
---	---	---

Indicator:

- a) _____ Sight, sound, smell, taste, and touch experiences are encouraged through a variety of developmentally appropriate materials and activities

Optional Notes: PHYSICAL (Items 4.1, 4.2, 4.3 above)

Review Notes	Observe Notes

Functional Area 5: **COGNITIVE**

Item 5.1 Activities encourage curiosity, exploration and discovery. (p. 62)

1	2	3
---	---	---

Indicator:

- a) _____ Activities involve developmentally appropriate, hands-on experiences

Item 5.2 Materials and equipment stimulate children's thinking and problem solving. (p. 63)

1	2	3
---	---	---

Indicators:

- a) _____ Materials and equipment provide a variety of opportunities for cognitive development
- b) _____ Materials chosen are meaningful to the children

Optional Notes: COGNITIVE (Items 5.1, 5.2 above)

Review Notes	Observe Notes

Functional Area 6: COMMUNICATION

Item 6.1 Materials promote early literacy. (p. 66)

1	2	3
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Indicators:

- a) _____ Literature/storytelling/bookmaking materials are provided
- b) _____ Developmentally appropriate books are available

Item 6.2 Activities promote language development. (p. 67)

1	2	3
---	---	---

Indicators:

- a) _____ Children are read to every day
- b) _____ Activities advance the development of language acquisition and writing skills
- c) _____ Activities provide frequent opportunities for children to listen, talk and express their ideas effectively
- d) _____ Activities support the needs of dual language learners (when applicable)

Optional Notes: COMMUNICATION (Items 6.1, 6.2 above)

Review Notes	Observe Notes

1	2	3
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1	2	3
---	---	---

1	2	3
---	---	---

1	2	3
---	---	---

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Optional Notes: SELF (Item 8.1 above)

<p>Review Notes</p>	<p>Observe Notes</p>
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Functional Area 9: SOCIAL

Item 9.1 The classroom environment provides opportunities for children to experience cooperation. (p. 83)

1	2	3
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Indicator:

- a) _____ Materials, equipment and activities provided help children experience working and playing in harmony

Item 9.2 A non-biased environment is provided. (p. 83)

1	2	3
---	---	---

Indicator:

- a) _____ Diverse activities, materials, curricula and/or events reflect multiple cultural groups, ethnicities and family structures

Optional Notes: SOCIAL (Items 9.1, 9.2 above)

<p>Review Notes</p>	<p>Observe Notes</p>
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Functional Area 10: GUIDANCE

Item 10.1 Spaces and materials are arranged to promote positive interactions and limit disruptive behaviors. (p. 88)

1	2	3
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Indicator:

- a) _____ Spaces and materials provided anticipate children’s behavioral and developmental needs

Optional Notes: GUIDANCE (Item 10.1 above)

Review Notes	Observe Notes

Functional Area 11: FAMILIES

Item 11.1 Various opportunities to appreciate and communicate with children’s families are included as part of the regular program. (p. 94)

1	2	3
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Indicators:

- a) _____ Room displays and materials reflect respect for various communities, cultural groups and families
- b) _____ Opportunities to communicate with and distribute information to families are provided

Optional Notes: FAMILIES (Item 11.1 above)

Review Notes	Observe Notes

1	2	3
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1	2	3
---	---	---

1	2	3
---	---	---

Item 2.4 Candidate provides appropriate mealtime experiences.

(p. 49)

1	2	3
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Indicators:

- a) _____ Serves nutritious meals and snacks
- b) _____ Facilitates appropriate mealtime experiences

Optional Notes: HEALTHY (Items 2.3, 2.4, 2.5 above)

<p>Review Notes</p>	<p>Observe Notes</p>
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Functional Area 3: LEARNING ENVIRONMENT

Item 3.4 Candidate's disposition is warm and welcoming. (p. 55)

1	2	3
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Indicator:

- a) _____ Creates a nurturing relationship with each child

Item 3.5 Candidate demonstrates sound judgment in using the posted Weekly Schedule/Daily Plan. (p. 56)

1	2	3
---	---	---

Indicators:

- a) _____ Generally follows posted schedule and plan
- b) _____ Veers from schedule and plan as needed

Item 3.6 Uses a variety of strategies to transition children from one activity to another. (p. 57)

1	2	3
---	---	---

Indicator:

- a) _____ Demonstrates an understanding of the importance of transitions

Optional Notes: LEARNING ENVIRONMENT (Items 3.4, 3.5, 3.6 above)

<p>Review Notes</p>	<p>Observe Notes</p>
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Functional Area 4: PHYSICAL

Item 4.4 Candidate's facilitation promotes children's physical development. (p. 61)

1	2	3
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Indicators:

- a) _____ Participates in physical activities with children, when appropriate
- b) _____ Guides the development of children's fine and gross motor skills

Optional Notes: PHYSICAL (Item 4.4 above)

<p>Review Notes</p>	<p>Observe Notes</p>
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Functional Area 5: COGNITIVE

Item 5.3 Candidate's interactions promote children's thinking and problem solving. (p. 64)

1	2	3
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Indicators:

- a) _____ Facilitates children's thinking and creative problem-solving skills

Item 5.4 Candidate's interactions intentionally build upon children's previous knowledge. (p. 65)

1	2	3
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Indicators:

- a) _____ Connects concepts to children's prior experiences
- b) _____ Supports children's repetition of the familiar

Optional Notes: COGNITIVE (Items 5.3, 5.4 above)

<p>Review Notes</p>	<p>Observe Notes</p>
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Functional Area 6: COMMUNICATION

Item 6.3 Candidate reads to children in a developmentally appropriate manner. (p. 69)

1	2	3
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Indicators:

- a) _____ Reads to children engagingly

Item 6.4 Candidate's interactions encourage children's communication skills. (p. 70)

1	2	3
---	---	---

Indicators:

- a) _____ Promotes children's language development through her/his verbal and non-verbal communications
- b) _____ Interacts with children, listening and responding appropriately
- c) _____ Supports the needs of dual language learners (when applicable)

Item 6.5 Candidate promotes children's vocabulary development. (p. 71)

1	2	3
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Indicators:

- a) _____ Intentionally provides opportunities for children to learn new words.
- b) _____ Regularly introduces children to more advanced vocabulary

Optional Notes: COMMUNICATION (Items 6.3, 6.4, 6.5 above)

Review Notes	Observe Notes

Functional Area 7: CREATIVE

Item 7.4 Candidate promotes individual expression and creativity. (p. 75)

1	2	3
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Indicators:

- a) _____ Encourages creative self-expression in children's activities
- b) _____ Facilitates child-directed and process-oriented creative experiences

Optional Notes: CREATIVE (Item 7.4 above)

Review Notes	Observe Notes

Functional Area 8: SELF

Item 8.2 Candidate's interactions help children develop positive self-concepts. (p. 79)

1	2	3
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Indicators:

- a) _____ Respects the individuality of each child
- b) _____ Shows sensitivity to and acceptance of each child's feelings and needs

Item 8.3 Candidate encourages children to develop a sense of independence. (p. 81)

1	2	3
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Indicators:

- a) _____ Encourages children's self-help/self-regulation skills while being respectful of family preferences and cultural differences
- b) _____ Ensures that toileting is a developmentally appropriate, positive experience for children
- c) _____ Promotes each child's growing sense of autonomy

Optional Notes: SELF (Items 8.2, 8.3, 8.4 above)

Review Notes	Observe Notes

Functional Area 9: SOCIAL

Item 9.3 Candidate promotes children's sense of belonging in the classroom community. (p. 84)

1	2	3
---	---	---

Indicators:

- a) _____ Encourages children's social interactions
- b) _____ Models appropriate social interactions

Item 9.4 Candidate helps children experience sympathy/empathy and respect for others. (p. 86)

1

2

3

Indicators:

- a) _____ Helps children understand their feelings and the feelings of others
- b) _____ Discusses diversity comfortably when interacting with children

Optional Notes: SOCIAL (Items 9.3, 9.4 above)

Review Notes

Observe Notes

Functional Area 10: GUIDANCE

Item 10.2 Candidate proactively implements methods for preventing behavioral problems. (p. 88)

1

2

3

Indicators:

- a) _____ Acknowledges positive behaviors
- b) _____ Models appropriate behaviors
- c) _____ Provides firm, consistent limits and expectations
- d) _____ Uses effective classroom management techniques
- e) _____ Helps children learn to articulate their emotions and practice how to respond in challenging situations

Item 10.3 Candidate uses positive techniques when reacting to children's challenging behaviors. (p. 91)

1

2

3

Indicators:

- a) _____ Places emphasis on the development of self-discipline/self-regulation
- b) _____ Deals with challenging behavior in a consistent and calm manner
- c) _____ Uses appropriate techniques to address negative behaviors

Optional Notes: GUIDANCE (Items 10.2, 10.3 above)

Review Notes

Observe Notes

Note to the CDA Professional Development Specialist™:

The following Items have been categorized as "Review" Items as they may not be fully observable in a typically-scheduled CDA Verification Visit™. Therefore the Council recommends that you primarily base your Recommended Scores on the Reflective Competency Statements and Resources in the candidate's Professional Portfolio that you will read during the Review Session.

Functional Area 11: FAMILIES**Item 11.2 Candidate appreciates the uniqueness of each family.**

(p. 95)

1	2	3
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Indicators:

- a) _____ Welcomes and respects every family

Item 11.3 Candidate partners with families to support the needs of their children. (p. 96)

1	2	3
---	---	---

Indicators:

- a) _____ Works closely with each family
- b) _____ Maintains open communication with families

Item 11.4 Candidate helps families understand and support the healthy growth and development of their child. (p. 98)

1	2	3
---	---	---

Indicators:

- a) _____ Provides information and opportunities to help families meet their child's developmental needs
- b) _____ Knows the social service, health and education resources of the community, engaging them when appropriate
- c) _____ Recommends activities families can do at home that support their child's development

Optional Notes: FAMILIES (Items 11.2, 11.3, 11.4 above)

Review Notes	Observe Notes

Functional Area 12: PROGRAM MANAGEMENT

Item 12.1 Candidate observes, documents and assesses each child’s developmental/educational progress. (p. 101)

1	2	3
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Indicators:

- a) _____ Objectively observes and records information about children’s behaviors and learning
- b) _____ Analyzes and assesses multiple sources of evidence in order to set appropriate developmental goals for each child/group, planning curriculum accordingly

Item 12.2 Candidate adheres to regulatory requirements and program policies. (p. 102)

1	2	3
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Indicators:

- a) _____ Adheres to current local child care regulations and program policies
- b) _____ Adheres to professional Mandated Reporting requirements related to abuse and neglect
- c) _____ Maintains current records on children’s health, safety and behavior

Item 12.3 Candidate maintains effective professional relationships. (p. 103)

1	2	3
---	---	---

Indicator:

- a) _____ Establishes cooperative interpersonal relationships with coworkers, colleagues, volunteers and supervisors

Note: You may find some needed evidence for this Item during the Observe Session, if the candidate is observed working with another teacher or colleague.

Optional Notes: PROGRAM MANAGEMENT (Items 12.1, 12.2, 12.3 above)

Review Notes	Observe Notes

Functional Area 13: PROFESSIONALISM

Item 13.1 Candidate commits to highest standards for professional practices. (p. 104)

1	2	3
---	---	---

Indicators:

- a) _____ Protects the confidentiality of information about children, their families and the child care program
- b) _____ Conducts her/himself in a professional manner at all times

Item 13.2 Candidate works with other professionals and families to communicate the needs of children and families to decision makers. (p. 105)

1	2	3
---	---	---

Indicators:

- a) _____ Advocates for the needs of children and families

Item 13.3 Candidate takes advantage of opportunities to continue professional growth. (p. 105)

1	2	3
---	---	---

Indicator:

- a) _____ Learns about new laws and regulations affecting child care, children, and families
- b) _____ Takes opportunities for professional and personal development by reflecting, joining professional organizations and attending meetings, training courses and conferences

(Continued on next page)

Note to the CDA Professional Development Specialist™:

One clear sign of the candidate's professionalism is his/her completion of the *Professional Portfolio* as a requirement of the credentialing process. Therefore, the following Item should also receive a Recommended Score:

Item 13.4 Candidate has completed all requirements of the CDA *Professional Portfolio* in preparation for this CDA Verification Visit™. (pp. 12-19)

1		3
---	-------------------------------------------------------------------------------------	---

3 = All Portfolio requirements met

1 = One or more Portfolio requirements were not met

(If 1, the CDA PD Specialist™ is required to add a brief note explaining the rationale and/or examples for that score)

Indicators:

- a) _____ Majority of Family Questionnaires distributed were collected
- b) _____ Six Reflective Competency Statements were written
- c) _____ Portfolio includes all of the required Resource Collection items
- d) _____ One Professional Philosophy Statement was written

Optional Notes: PROFESSIONALISM (Items 13.1, 13.2, 13.3, 13.4)

Review Notes

Observe Notes

Required Portfolio Components

If either of the following required Portfolio components do not meet requirements, you must notify the candidate at the conclusion of the CDA Verification Visit™ that she/he will receive a postcard from the Council notifying him/her of the required procedures for correcting these errors within six months of his/her *Ready to Schedule* notice.

In the spaces below, write down the reason(s) the components do not meet requirements. You will then submit this information to the Council online, along with your Recommended Scores.

1. The candidate's 120 clock hours of Professional Education meets all requirements (pp. 10-11):

☐ Yes ☐ No

If "No," please explain: _____

2. The candidate's First Aid/CPR certification meets all requirements (p. 14):

☐ Yes ☐ No

If "No," please explain: _____

For the CDA PD Specialist™:

Reminders to Myself to Prepare for the Reflective Dialogue

Clarifications (complete this section after the Review and Observe sessions)

After reviewing this candidate's portfolio and observing him/her working with children, I may still need to ask the candidate some questions of clarification about the following topics that I was unable to read about or observe:

Professional Philosophy Statement (complete this section during the Review Session)

After reading the candidate's *Professional Philosophy Statement*, here are one or more key topics about how he/she puts her professional philosophy into practice, that I may want to bring up as I facilitate the reflective dialogue:

CDA Professional Development Specialist™ Feedback (complete this section after the Review and Observe sessions)

After reading through this candidate's *Professional Portfolio* and observing her/him working with children, I will mention the following Area of Strength and Area for Professional Growth during the reflective dialogue:

One Area of Strength

One Area for Professional Growth



CDA Verification Visit™ Reflective Dialogue Worksheet

Note to Candidate: The last step of the CDA Verification Visit™ process is the reflective dialogue, the culminating activity designed to support your ongoing reflection about your professional practices. Please know that the dialogue you will have with your CDA Professional Development (PD) Specialist™ will be kept confidential between the two of you, will not be scored and has no bearing on the award of your CDA® Credential. You will retain this worksheet after the dialogue - no one else will see this worksheet unless you choose to share it. Therefore, feel free to reflect honestly and candidly about your professional strengths and areas for growth. There are no “right” or “wrong” answers in a reflective dialogue – only your commitment to your own professional growth and the goals you will set for yourself.

Step 1: Identify Areas of Strength and Areas for Future Professional Growth

In order to identify the best goals for yourself, it may be helpful to first explore different perspectives – (1) opinions from the families you serve, (2) your own thoughts and (3) feedback from your CDA PD Specialist™, who has just read your *Professional Portfolio* and observed you working with children. Before your CDA Verification Visit™, please read the *Family Questionnaires* you received. Look for trends or patterns of responses and write down, in boxes A and B below, as many areas of strength and areas for professional growth that you would like. You will complete the second and third columns during the reflective dialogue.

	1. Family Questionnaires (to be completed by the candidate prior to the CDA Verification Visit™)	2. Candidate Self-Reflection (to be completed by the candidate during the reflective dialogue)	3. Feedback From My PD Specialist (to be completed by the candidate during the reflective dialogue)
What are Your Area(s) of Professional Strength?	A	C	E
What are your Area(s) for Future Professional Growth?	B	D	F

Step 2: Set Goals, Plan Action Steps

Now that you have listed your perceived strengths and areas for future growth, what goal or goals might you set for yourself? Is there a strength you're committed to strengthening even further? Is there an area you've identified that you are committed to improving? In the spaces below, list up to three professional goals you are committed to achieving. After writing each goal, discuss with your CDA PD Specialist™ steps you might take to reach that goal.

Goal #1:	Steps I could take to reach Goal #1:
Goal #2:	Steps I could take to reach Goal #2:
Goal #3:	Steps I could take to reach Goal #3:

Step 3: Commit to Achieving Your Goal(s)

I, _____, hereby commit to achieving my goal(s) in order to further develop as a professional and to become even more effective at serving the needs of the children and families in my care.

_____ CDA® Candidate (sign here)

_____ as witnessed by my CDA PD Specialist™ (sign here)

This worksheet is now yours to keep. Being a reflective practitioner and meeting the goals you've set for yourself is up to you, regardless of whether you are awarded your CDA® Credential. The Council encourages you to share your goals with a mentor, colleague or supervisor who will support you, hold you accountable for meeting your goals and celebrate with you when you have met them.



MY CDA® Professional Portfolio

Candidate Name

Candidate ID Number

Use the following checklist to organize your *Professional Portfolio* in the order listed below. You may check off each item in the last column as it is completed. Use this “My CDA® Professional Portfolio” sheet as the cover sheet inside your Portfolio. Please see pp. 15-21 for a detailed explanation.

TAB	REQUIRED PORTFOLIO ITEM		✓
	“My CDA® Professional Portfolio” cover sheet (this document)		
A	“Summary of My CDA® Education” cover sheet followed by all relevant training transcripts, certificates and official documentation		
B	“Family Questionnaires” cover sheet followed by all completed, returned Family Questionnaires		
C	Parent Observation Permission Form and Reflective Dialogue Worksheet , Boxes A and B		
D	CDA® Assessor Recommendation completed and signed by your Assessor		
E	CS I Resource Collection Items	RC I-1, RC I-2, RC I-3	
	Reflective Competency Statement I	CS I, including paragraphs CS I a, CS I b, CS I c	
F	CS II Resource Collection	RC II-1 through RC II-9	
	Reflective Competency Statement II	CS II, including paragraphs CS II a, CS II b, CS II c, CS II d	
G	CS III Resource Collection	RC III	
	Reflective Competency Statement III	CS III, including paragraphs CS III a, CS III b	
H	CS IV Resource Collection Item	RC IV-1 through RC IV-4	
	Reflective Competency Statement IV	CS IV, including paragraphs CS IV a, CS IV b, CS IV c	
I	CS V Resource Collection Items	RC V	
	Reflective Competency Statement V	CS V, including paragraph CS V a	
J	CS VI Resource Collection Items	RC VI-1, RC VI-2, RC VI-3	
	Reflective Competency Statement VI	CS VI, including paragraphs CS VI a, CS VI b	
K	Professional Philosophy Statement		

I attest that the following *Professional Portfolio* includes *Resource Collection* items that I gathered, myself, as well as original Statements written by me that reflect my work with the children and families in my care.

Candidate Signature

Date



Summary of My CDA® Education

Candidate Name

Note to Candidate: Please use this summary document as the cover sheet to your “education documentation”; the collection of transcripts, letters, certificates, etc. that you will place in your *Professional Portfolio* to document how you met the educational requirements for the CDA® Credential. At your CDA Verification Visit™, your CDA Professional Development Specialist™ will review this sheet to ensure that it accurately reflects your education documentation that follows. Please see p. 10-12 for a detailed explanation of acceptable professional education.

Statements of CDA® Education Completion:

I attest to completing the required 10 hours of education in each of the following CDA® Subject Areas.

CDA® Subject Areas	Please initial below
1. Promoting health and safety in the home environment	
2. Enhancing parents’ skills to advance children’s physical and intellectual development	
3. Promoting parents’ use of positive ways to support children’s social and emotional development	
4. Understanding family systems and development	
5. Managing an effective home visitor program operation	
6. Maintaining a commitment to professionalism	
7. Working across the child welfare continuum	
8. Understanding principles of child development and learning	

I attest to the accuracy of the above Statements of Completion: that I completed at least 10 clock hours of professional education in each of the 8 CDA® Subject Areas. I also attest that I have met or exceeded 120 total clock hours of CDA®-related professional education.

Candidate Signature

Date

Agenda for the Reflective Dialogue with a Home Visitor CDA® Candidate

Welcome & Clarifications (Up to 10 min.)

Welcome

- The Home Visitor CDA PD Specialist™ begins by welcoming the Candidate and reviewing the agenda, expectations and goals for the session by saying “We will be spending 60 minutes together. My role is to assist you as you reflect on your continuing professional growth and set new goals for yourself.”

Clarifications (optional)

- The Home Visitor CDA PD Specialist™ uses this time to ask questions regarding any Items in the Comprehensive Scoring Instrument that may still need clarification after the Review and Observation. (i.e., “I wasn’t able to read or observe anything about tips for parents on nap time. How do you make sure that parents learn the need for naps as ‘a pleasant rest time for all children?’” or “I wasn’t able to read or observe anything about how you help parents facilitate meal times. Tell me about how you support parents to ‘facilitate appropriate mealtime experiences.’”)

Reflective Dialogue Introduction, Professional Philosophy Statement (10 min.)

Reflective Dialogue Introduction

- The Home Visitor CDA PD Specialist™ introduces the Reflective Dialogue by explaining that:
 - a. The reflective dialogue will not be scored.
 - b. There are no “right” or “wrong” answers in the discussion we’re about to have.

The Home Visitor CDA PD Specialist™ asks the Candidate to turn to the Reflective Dialogue Worksheet found on p. 137 in this book. During the Reflective Dialogue, he/she will use the Worksheet to record important points to remember about the Candidate’s Areas of Professional Strength and Areas for Future Professional Growth. He/she will then refer to their Worksheet, at the end of the Dialogue, as they sets goals and records possible steps to reach each goal.

Professional Philosophy Statement Review

- The Home Visitor CDA PD Specialist™ and Candidate discuss the Candidate’s Professional Philosophy Statement.
- The Home Visitor CDA PD Specialist™ asks, “In what ways does your adult teaching practice reflect your professional philosophy?” or “That’s really powerful. How do you make your philosophy come alive?”

Candidate Self-Reflection (20 min.)

Areas of Professional Strength

- a. Home Visitor CDA PD Specialist™: “What do you think/believe are your greatest areas of strength as a professional home visitor?”
- b. “Why? How did you develop these areas of strengths?”
- c. “How do you think your areas of strength may positively impact the families of the children in your case load?”

Agenda for the Reflective Dialogue with a Home Visitor CDA® Candidate continued...

Areas for Future Professional Growth

- Home Visitor CDA PD Specialist™: “What do you think/believe are your greatest areas for future growth as a home visitor professional?”
- “Why do you think this area(s) is more challenging for you than the areas you mentioned as strengths?”
- “How do you think working on these areas for growth may positively impact the families of the children in your caseload?”

CDA PD Specialist™ Feedback (less than 10 min.)

One Area of Professional Strength

- Home Visitor CDA PD Specialist™: “Having reviewed your Portfolio and observed you working with families, here is the greatest area of professional strength I documented.”
- “How did you develop this strength?”
- “How do you think this strength may positively impact the families in your case load?”

One Area for Future Professional Growth

- “Here is an area for future professional growth that I documented.”
- “How might growing in this area positively impact the families in your case load?”

Goal-Setting & Action-Planning, Close (10 min.)

Goal-Setting

- Home Visitor CDA PD Specialist™: “Using the areas of strength and future growth that you’ve identified and written down on your Reflective Dialogue Worksheet, let’s take some time to identify 1-3 professional development goals you might set for yourself.” (Note: final goals are determined by the Candidate, never by the Home Visitor CDA PD Specialist™.)

Action-Planning

- Home Visitor CDA PD Specialist™: “How will you achieve these goals and by when? Let’s brainstorm some actions you might take and timelines for completion. Then you can write them in the appropriate spaces on your Worksheet.”
- Candidate and Home Visitor CDA PD Specialist™ both sign statements at the bottom of the Worksheet. (The Candidate commits to pursuing goals, and the CDA PD Specialist™ signs to witness the Candidate’s commitment.)

Close

- Home Visitor CDA PD Specialist™: “Thank you for spending this time in the Reflective Dialogue with me. I hope you found it valuable. The Council would like to encourage you to share your goals with a mentor or your supervisor – someone who might hold you accountable and support you in successfully achieving them as you continue to grow as a home visitor professional.”



Home Visitor CDA®

Parent Observation Permission Form

I understand that _____

(Home Visitor CDA Candidate's Name)

has applied for a Home Visitor CDA® Credential and that he/she needs to be observed conducting a home visit. I give my permission to have the CDA PD Specialist™ observe this candidate's home visit with my family. I understand that the CDA PD Specialist™ will be observing the candidate and not evaluating my family or home. I expect the CDA PD Specialist™ to conduct herself/himself in a professional way and to share information from the observations only with authorized representatives of the Council.

Name of CDA PD Specialist™ (observer): _____

Signature of Parent or Guardian

Date



CDA para Visitador de hogares

Formulario de autorización de observación del padre

Entiendo que _____

(Nombre del candidato CDA®)

desea obtener una credencial CDA® para lo cual debe ser observado durante la realización de una visita a un hogar. Concedo autorización para que el Especialista CDA en desarrollo profesional^{MR} observe a este candidato durante su visita a mi familia. Entiendo que esta persona observará únicamente al candidato y no evaluará a mi familia o mi hogar. Espero que el observador se conduzca de manera profesional y que comparta la información obtenida de estas observaciones única y exclusivamente con los representantes autorizados del Programa Nacional de Certificación CDA^{MR}.

Nombre del Especialista CDA en desarrollo profesional^{MR} (Observador): _____

Firma del padre/madre o tutor

Fecha



Home Visitor CDA® Assessor Recommendation Form

To be completed by the home visitor candidate's Assessor (Mentor/Coach/Instructor) working in the candidate's home visitor program or in the candidate's training agency.

Home Visitor Candidate's Name: _____

Last four digits of the candidate's identification number: _____

_____ I have been involved in this candidate's professional life for at least 12 weeks before completing recommendation, and have knowledge of the candidate's professional development and performance as a home visitor.

_____ I have no conflict of interest serving as the Assessor for this candidate.

Select Circle One:

- | | |
|---|---------------------------------------------------------------------------------------------------|
| 3 | I strongly recommend this candidate for the award of her Home Visitor CDA® Credential. |
| 2 | I recommend this candidate for the award of her Home Visitor CDA® Credential. |
| 1 | I recommend, with reservations, this candidate for the award of her Home Visitor CDA® Credential. |

Please describe a summary of this candidate's performance as a home visitor working with families and their children in relation to the six CDA® Competency Goals and 13 CDA Functional Areas, as outlined in the CDA® Competency Standards Book for Home Visitors.

Signature: _____ Date: _____

Your Agency or Organization: _____

Your position: _____ Telephone number: _____

Address: _____

City: _____ State: _____ Zip Code: _____

IMPORTANT: PLEASE PLACE THIS RECOMMENDATION IN A SEALED ENVELOPE AND RETURN TO HOME VISITOR CANDIDATE.

NOTE TO CANDIDATE: Do not write on this Comprehensive Scoring Instrument. Leave blank for your CDA PD Specialist™.



Comprehensive Scoring Instrument

Candidate's Name: _____

Credential Type: ☐ Home Visitor

Bilingual Specialization: ☐ Yes ☐ No

Date of Portfolio Review: _____

Date of Observation: _____

Hours of Observation: _____ **Ages of Children in the Home:** _____

Instructions for the CDA Professional Development (PD) Specialist™:

The CDA® Comprehensive Scoring Instrument (CSI) is the tool you will utilize to determine the competencies of the candidate named above, using multiple sources of evidence:

- (1) the contents of the candidate's *Professional Portfolio*
- (2) your direct observation of the candidate conducting a visit with one family and
- (3) your skilled perceptions of the candidate's care/evaluation of the family that influences the home environment

Structure of the CSI

The CSI was designed to reflect the nationally-recognized CDA® Competency Standards, found on p. 40. in this book, that provide a baseline of competencies for all home visitor professionals working with, educating and caring for families of young children.

In order to best elaborate on the key professional practices identified, the Standards in this tool have been arranged according to the following hierarchy:

Functional Area

Item/Item/Item

a) Indicator

Home Visitor CDA PD Specialists™ are responsible for using the CSI tool to determine and submit to the Council Recommended Scores (1 – 3) at the Item level. In order to assist you in this endeavor, it is recommended that you review and observe at the Indicator level, later using your professional judgment to assign Item scores based on the averages or patterns you have recorded of that Item's related Indicators.

In order to best determine Indicator scores you may need to consult the various optional examples listed in the Competency Standards section of the book. Please remember that these examples are optional and are provided only for the purposes of illustration. They were not designed to be an inclusive list that every Home Visitor candidate must display in order to be assigned a Recommended Score.

Additional examples have also been provided and must be taken into consideration for certain Items when reviewing and observing a candidate applying for bilingual specialization.

Leave these CSI pages attached to the book during the CDA Verification Visit™ in order to quickly consult the examples for clarification whenever needed.

Use of the CSI

You will rate the candidate on a scale of 1 – 3:

1	2	3
---	---	---

1 = Little or no evidence

2 = Some evidence

3 = Great deal of evidence

Full instructions for use of the CSI can be accessed by CDA PD Specialists™ in the CDA Professional Development Specialist™ Resource Library and in the CDA Professional Development Specialist™ Procedures Manual. Note: The CSI Score ratings must be completed in its entirety. When submitting a score of 1 to the Council online, the CDA PD Specialist™ is required to add a brief note explaining the rationale and/or examples for that score.

Sections of the CSI

In order to make your use of the tool as efficient as possible during the CDA Verification Visit™, the CSI has been sorted into three color-coded sections:

Settings & Activities

This section includes all of the Items that do not rely on candidate behaviors. In other words, you will be able to assess these Items without the candidate present; by reading the related topics in the candidate's *Professional Portfolio* and/or by looking at the home environment influenced by the candidate's work with the family.

NOTE: Your observation of the home visiting environment may be supported by the related writings/resources found in the candidate's Reflective Statement of Competence about "Competency Standard I: Safe, Healthy Learning Environments" when reviewing the Portfolio.

Actions & Interactions

This section will be the primary section used during your observation of the candidate while conducting a home visit with one family (minimum of one hour, maximum of three hours). All of the Items in this section relate to candidate behaviors; the ways you observe he/she acting and interacting with the families and family members (including young children). However, it is important to remember that your focus is on the candidate working as the adult educator for the family.

Review

This section includes all of the Items that are typically unobservable. In order to determine Recommended Scores for each of these Items, you will likely need to rely solely on what you read in the candidate's *Professional Portfolio* during the one-hour Review session.

Final Steps

The final step, once you have completed the Review and Observe sessions using this CSI, is to facilitate the Reflect Session with the candidate. During this session, you may ask questions of clarification to assist you in completing the CSI. You will also discuss the candidate's Professional Philosophy Statement and provide the candidate with your feedback about one "Area of Professional Strength" and one "Area for Professional Growth" based on your review and observation. To prepare, feel free to use the "Reminders to Myself to Prepare for the Reflective Dialogue" sheet found on the last page of this CSI.

Upon completion of the CDA Verification Visit™, you must remove the CSI from this book using the perforations on the inside of each page. You will then return the book to the candidate and take the CSI with you in order to use when you submit this candidate's Recommended Scores to the Council through the Submission Tool in the online CDA PD Specialist™ Portal.

In order to protect candidate confidentiality, the CDA PD Specialist™ may not share or make copies of the notes or Recommended Scores recorded on the CSI with/for any person, including the candidate. Once the Recommended Scores have been submitted to the Council online, the CDA PD Specialist™ is required to keep the original CSI tool, the Pre-Verification Visit Checklist, Parent Observation Permission Form and Assessor Recommendation for 6 months.

Functional Area 1: **SAFE**

Item 1.1 Home environments (indoor and outdoor) are safe for all children and adults. (p. 44)

1	2	3
---	---	---

Indicator:

- a) _____ Materials, equipment and environments are safe

Item 1.2 Well-planned and well-organized emergency procedures and supplies are evident in the home. (p. 44)

1	2	3
---	---	---

Indicators:

- a) _____ Emergency plan and/or emergency telephone numbers are posted in the home
- b) _____ First-aid supplies and medicines are stored appropriately and accessible to adults only

Optional Notes: SAFE (Items 1.1, 1.2 above)

Review Notes	Observation Notes

Functional Area 2: **HEALTHY**

Item 2.1 Children’s home promotes good health. (p. 48)

1	2	3
---	---	---

Indicators:

- a) _____ Materials, toys, equipment in the home, and home environment are clean and promote good health
- b) _____ Disinfecting and sanitizing solutions are present and stored appropriately
- c) _____ There is evidence of relevant health information provided to families

Optional Notes: HEALTHY (Item 2.1 above)

Review Notes	Observation Notes

Functional Area 3: **LEARNING ENVIRONMENT**

Item 3.1 Home environments are developmentally appropriate for young children. (p. 52)

1

2

3

Indicators:

- a) _____ Environment indoor and outdoor is pleasant, clean, welcoming and provides appropriate levels of stimulation
- b) _____ Environment includes toys made from inexpensive materials that are both appropriate for the child's developmental and chronological age

Item 3.2 Developmentally appropriate materials are available. (p. 53)

1

2

3

Indicators:

- a) _____ Toys and materials are developmentally appropriate for children in the home
- b) _____ A variety of materials found in and around the home are provided for learning
- c) _____ There is sufficient number of materials for the children in the home
- d) _____ Materials are organized and accessible to children throughout the day

Item 3.3 Daily schedule and weekly plan(s) are developmentally appropriate. (p. 54)

1

2

3

Indicators:

- a) _____ Schedule allows for routine needs of children to be met
- b) _____ Children's schedule meets children's needs for play
- c) _____ Spontaneous activities are allowed and encouraged
- d) _____ Weekly Plans include experiences for the family, for the parents and for children
- e) _____ Nap or quiet times are part of the daily schedule and they meet each child's need for rest

Optional Notes: LEARNING ENVIRONMENT (Items 3.1, 3.2, 3.3 above)

Review Notes

Observation Notes

Functional Area 4: **PHYSICAL**

Item 4.1 There is evidence activities, materials and equipment to encourage parents to promote children of varying abilities to develop their large muscles. (p. 62)

1	2	3
---	---	---

Indicator:

- a) _____ Gross motor skills are encouraged through developmentally appropriate materials, equipment and indoor/outdoor activities

Item 4.2 Activities and materials encourage parents to promote children of varying abilities to develop their small muscles. (p. 62)

1	2	3
---	---	---

Indicator:

- a) _____ Individual fine motor skills are encouraged through a variety of developmentally appropriate materials and activities

Item 4.3 Activities and materials encourage parents to promote their children's sensory development. (p. 63)

1	2	3
---	---	---

Indicator:

- a) _____ Sight, sound, smell, taste, and touch experiences are encouraged through a variety of developmentally appropriate materials and activities

Optional Notes: PHYSICAL (Items 4.1, 4.2, 4.3 above)

Review Notes	Observation Notes

Functional Area 5: **COGNITIVE**

Item 5.1 There is evidence that activities offered by parents encourage curiosity, exploration and discovery. (p. 65)

1	2	3
---	---	---

Indicator:

- a) _____ Activities involve developmentally appropriate, hands-on experiences

Item 5.2 There is evidence that materials and equipment at the home stimulate children's thinking and problem solving. (p. 65)

1	2	3
---	---	---

Indicators:

- a) _____ Materials and equipment provide a variety of opportunities for cognitive development
- b) _____ Materials chosen (recommended to the parent by the candidate) are meaningful to the children

Optional Notes: COGNITIVE (Items 5.1, 5.2 above)

<p>Review Notes</p>	<p>Observation Notes</p>
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Functional Area 6: COMMUNICATION

Item 6.1 There is evidence that materials in the home promote early literacy. (p. 68)

1	2	3
---	---	---

Indicators:

- a) _____ Literature/storytelling/bookmaking materials are provided
- b) _____ Developmentally appropriate books are available

Item 6.2 There is evidence that activities in the home promote language development. (p. 69)

1	2	3
---	---	---

Indicators:

- a) _____ Children are read to every day
- b) _____ Activities in the home advance the development of language acquisition and writing skills
- c) _____ Activities in the home provide frequent opportunities for children to listen, talk and express their ideas effectively
- d) _____ Activities in the home support the needs of dual language learners (when applicable)

Optional Notes: COMMUNICATION (Items 6.1, 6.2 above)

Review Notes	Observation Notes

Functional Area 7: CREATIVE

Item 7.1 There is evidence of activities and materials provided to parents so they can encourage children to express themselves through the visual arts. (p. 74)

1	2	3
---	---	---

Indicators:

- a) _____ Art materials and activities are available for children daily

Item 7.2 There is evidence of activities and materials provided to parents so they may encourage children to dance, move and develop their musical abilities. (p. 74)

1	2	3
---	---	---

Indicators:

- a) _____ Music and dance/movement materials and activities are available for children daily

Item 7.3 There is evidence of activities and materials provided to parents so they can encourage children to develop their imaginations. (p. 75)

1	2	3
---	---	---

Indicators:

- a) _____ Dramatic play materials and activities are available for children daily

Optional Notes: CREATIVE (Items 7.1, 7.2, 7.3 above)

Review Notes	Observation Notes

Functional Area 8: **SELF**

Item 8.1 The home environment supports children's development of positive self-concepts. (p. 80)

1

2

3

Indicators:

- a) _____ Spaces and activities help each child develop a sense of self-identity/worth
- b) _____ Materials chosen provide children opportunities to experience success

Optional Notes: **SELF** (Item 8.1 above)

Review Notes	Observation Notes

Functional Area 9: **SOCIAL**

Item 9.1 The home environment provides opportunities for children to experience cooperation. (p. 83)

1

2

3

Indicator:

- a) _____ Materials, equipment and activities provided help children experience working and playing in harmony with other siblings and/or adults in the home

Item 9.2 A non-biased environment is provided. (p. 83)

1

2

3

Indicator:

- a) _____ Diverse activities, materials, curricula and/or events reflect an understanding of others' cultures and the value of non-bias and anti-bias.

Optional Notes: **SOCIAL** (Items 9.1, 9.2 above)

Review Notes	Observation Notes

Functional Area 10: GUIDANCE

Item 10.1 Spaces and materials in the home are intentionally arranged according to children’s developmental needs to promote positive interactions and limit disruptive behaviors. (p. 86)

1	2	3
---	---	---

Indicator:

- a) _____ Spaces and materials in the home anticipate children’s behavioral and developmental needs

Optional Notes: GUIDANCE (Item 10.1 above)

Review Notes	Observation Notes

Functional Area 11: FAMILIES

Item 11.1 Parents/families are appreciated and they are the center of the program. (p. 91)

1	2	3
---	---	---

Indicators:

- a) _____ Home toys, materials and equipment reflect respect for family’s culture, religion and childrearing practices
- b) _____ There is evidence of having a home visit format that includes times when the home visitor and parent(s) talk alone; when the Home visitor facilitates parent-child interaction as modeling to the parent; and when home visitor and other family members engage in activities

Optional Notes: FAMILIES (Item 11.1 above)

Review Notes	Observation Notes

Functional Area 1: **SAFE**

Item 1.3 Helps families ensure that their homes, vehicles and outdoor play areas are safe for children at different stages of development. (p. 45)

1

2

3

Indicators:

- a) _____ Helps parents ensure that inside of the home and outdoor area are free of dangerous conditions and materials
- b) _____ Assists parents to determine and make the necessary modifications in their homes to ensure the safety of children, including those with disabilities
- c) _____ Provides information to parents regarding accident prevention and the use of safety devices, and emergency preparedness
- d) _____ Helps parents understand that the quality and amount of supervision and caution is based on children at different developmental stages

Optional Notes: **SAFE** (Item 1.3 above)

Review Notes	Observation Notes

Actions & Interactions

Functional Area 2: **HEALTHY**

Item 2.2 Helps parents and other adults to understand and consistently follow general hygiene practices. (p. 49)

1

2

3

Indicators:

- a) _____ Materials, equipment and environments are clean and promote good health
- b) _____ Teaches parents correct hand washing procedures before and after serving food, diapering/toileting and whenever needed
- c) _____ Encourage parents gain access to medical, mental health and oral care for themselves and their children to maintain wellness and to treat illness

Item 2.3 Encourages parents to prepare nutritious foods for snacks and meals and to help children learn to select and enjoy nutritious foods. (p. 50)

1	2	3
---	---	---

Indicators:

- a) _____ Provides information to parents on the importance of preparing, serving and storing foods high in nutrients and fiber and low in fats, salt and sugar
- b) _____ Encourages parents to prepare nutritious foods, shares recipes with families, and demonstrates proper cooking techniques

Item 2.4 Helps parents understand the need for exercise and rest for them and for their children. (p. 51)

1	2	3
---	---	---

Indicators:

- a) _____ Includes physical activities in home visit plans and in plans to take place between home visits
- b) _____ Balances active and quiet experiences during home visit and between home visit activities

Optional Notes: HEALTHY (Items 2.2, 2.3, 2.4 above)

Review Notes	Observation Notes

Functional Area 3: **LEARNING ENVIRONMENT**

Item 3.4 Help parents understand and incorporate their background, family structure, culture, and personal values in preparing/arranging/changing their home environment. (p. 55)

1	2	3
---	---	---

Indicators:

- a) _____ Encourages parents to use materials representative of their background and culture
- b) _____ Helps parents understand the importance of positive interactions between family members as an important aspect of the learning environment

Item 3.5 Helps parents to identify, select and use toys, books, and equipment that match each child's abilities, interests, and preferred learning styles. (p. 56)

1	2	3
---	---	---

Indicators:

- a) _____ Talks with parents about children's developmental levels. Includes ways that children typically learn and the need to address children's strengths, interest, needs and learning styles while planning the environment and experiences/activities for them.
- b) _____ Helps parents recognize the importance of using materials found in and around the home as opportunities for learning.

Item 3.6 Helps parents to understand children's needs for variety in their schedules: active and quiet play, physical activity and rest, individual and group play. (p. 57)

1	2	3
---	---	---

Indicator:

- a) _____ Works with parents to develop schedules for children that meet their needs

Optional Notes: LEARNING ENVIRONMENT (Items 3.4, 3.5, 3.6 above)

<p>Review Notes</p>	<p>Observation Notes</p>
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Functional Area 4: PHYSICAL

Item 4.4 Encourages parents to engage in physical activities that foster and promote children's physical development. (p. 63)

1	2	3
---	---	---

Indicators:

- a) _____ Helps parents serve as role models for their children and coaches parents to notice what their children can do with their large muscles
- b) _____ Helps parents serve as role models for their children and coaches parents to notice what their children can do with their small muscles

Optional Notes: PHYSICAL (Item 4.4 above)

Review Notes	Observation Notes

Functional Area 5: COGNITIVE

Item 5.3 Assist parents to enhance own their problem-solving and exploration skills and to encourage their children's questioning, probing, exploring and problem solving skills. (p. 66)

1	2	3
---	---	---

Indicators:

- a) _____ Models the use of problem solving and exploration skills and discusses with parents ways that adults can use these skills

Item 5.4 Assist parents in understanding how children develop literacy and STEM (Science, Technology, Engineering and Math) skills and concepts children must acquire to foster this learning. (p. 66)

1	2	3
---	---	---

Indicators:

- a) _____ Helps parents understand the importance of brain development in the early years of life
- b) _____ Explains to parents how children's play skills are directly related to the development of literacy and math and plans activities with parents to foster these skills in their children

Optional Notes: COGNITIVE (Items 5.3, 5.4 above)

Review Notes	Observation Notes

Functional Area 6: **COMMUNICATION**

Item 6.3 Helps parents to strengthen their communication skills and to communicate frequently with their children. (p. 70)

1	2	3
---	---	---

Indicators:

- a) _____ Talks with parents about adult and children's communication skills, including expressive, receptive and nonverbal communication

Item 6.4 Speaks to parents at their level of understanding, and encourages them to use simple sentences with children. (p. 71)

1	2	3
---	---	---

Indicators:

- a) _____ Models and encourages parents to talk with children about real things they are experiencing
- b) _____ Speaks to parents at their level of understanding, and encourages them to use simple sentences with children
- c) _____ Assists parents in identifying teachable moments for promoting communication

Item 6.5 Encourages families to maintain developmentally appropriate print-rich home environments in which children learn about books, literature and writing. (p. 72)

1	2	3
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Indicators:

- a) _____ Helps parents to recognize opportunities for using the written word in their family's routines
- b) _____ Assists parents with learning and practicing techniques for making reading fun

Optional Notes: COMMUNICATION (Items 6.3, 6.4, 6.5 above)

<p>Review Notes</p>	<p>Observation Notes</p>
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Functional Area 7: CREATIVE

Item 7.4 Helps parents realize that young children are creative and display vivid imaginations when given opportunities to freely and individually express themselves. (p. 76)

1	2	3
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Indicators:

- a) _____ Shows appreciation for parents and other family members' expressions of creativity
- b) _____ Encourages parents to appreciate and value their children's individual expression of creativity

Optional Notes: CREATIVE (Item 7.4 above)

Review Notes	Observation Notes

Functional Area 8: SELF

Item 8.2 Helps parents to value their own self-worth and to know, accept, and appreciate each child and adult family member as an individual. (p. 81)

1	2	3
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Indicators:

- a) _____ Uses words and actions that parents can interpret as demonstrations of respect and trust
- b) _____ Helps parents to achieve goals they have set for themselves, for their families, and for their children

Item 8.3 Demonstrates sensitivity to differing cultural values and expectations concerning independence, autonomy, and expression of feelings. (p. 81)

1	2	3
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Indicators:

- a) _____ Asks parents to discuss the personal qualities that they value in their children
- b) _____ Helps parents to identify and use strategies that promote the qualities they value in their children
- c) _____ Helps parents and children feel proud of themselves

Optional Notes: SELF (Items 8.2 and 8.3 above)

Review Notes	Observation Notes

Functional Area 9: SOCIAL

1	2	3
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Item 9.3 Helps parents understand that children learn appropriate social skills by observing how other people act with each other. (p. 84)

Indicators:

- a) _____ Reinforces parents and other family members' positive, consistent and sensitive social interactions
- b) _____ Helps parents to facilitate children's group play

1	2	3
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Item 9.4 Helps parents to understand and promote feelings of empathy and respect for others. (p. 84)

Indicators:

- a) _____ Uses empathy and respect for others in all interactions with families
- b) _____ Helps parents understand typical social behaviors in young children and how they express them so they can have appropriate expectations, avoiding "guessing" while promoting learning

Optional Notes: SOCIAL (Items 9.3, 9.4 above)

Review Notes	Observation Notes

Functional Area 10: GUIDANCE

Item 10.2 Helps parents to learn and use positive guidance techniques. (p. 86)

1	2	3
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Indicators:

- a) _____ Encourages parents to set realistic goals for children
- b) _____ Uses the language in which each parent and child understand expectations
- c) _____ Works with parents to identify their guidance and discipline goals for themselves and for their children
- d) _____ Works with parents to help them understand the difference between punishment and discipline or guidance
- e) _____ Helps parents understand that many challenging behaviors can be prevented through simple solutions

Item 10.3 Candidate uses positive techniques when reacting to children's challenging behaviors. (p. 88)

1	2	3
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Indicators:

- f) _____ Helps parents develop their own skills to respect each child's dignity serving as a model of patience, understanding, and acceptance.
- g) _____ Discusses with parents ways that adults and children learn self-regulation and ways to express discontent, anger, frustration, and anxiety
- h) _____ Helps parents to organize their environments and experiences so that children know what is expected and what the boundaries are

Optional Notes: GUIDANCE (Items 10.2, 10.3 above)

Review Notes	Observation Notes

Note to the CDA Professional Development Specialist™:

The following Items have been categorized as "Review" Items as they may not be fully observable in a typically-scheduled CDA Verification Visit™. Therefore the Council recommends that you primarily base your Recommended Scores on the Reflective Competency Statements and Resources in the candidate's Professional Portfolio that you will read during the Review Session.

Functional Area 11: FAMILIES

Item 11.2 Helps parents recognize that they are the center of the program. (p. 92)

1	2	3
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Indicators:

- a) _____ Implements a family-centered responsive home visitor practice

Item 11.3 Uses information about families' cultures, religion, and childrearing practices in program experiences. (p. 93)

1	2	3
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Indicators:

- a) _____ Helps family members to identify and value their family's beliefs, culture and values
b) _____ Enhances family experiences with activities "borrowed" from other cultures

Item 11.4 Uses a variety of techniques, including information dissemination, referral and brokering, to help families meet their young children's needs. (p. 93)

1	2	3
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Indicators:

- a) _____ Exchanges information with parents about community events and community agencies
b) _____ Collaborates with parents to plan program events and topics for discussion at parent meetings/parent support groups
c) _____ Establishes collaborative working relationships with other helping professionals in the community

Optional Notes: FAMILIES (Items 11.2, 11.3, 11.4 above)

<p>Review Notes</p> 	<p>Observation Notes</p>
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Functional Area 12: PROGRAM MANAGEMENT

Item 12.1 Candidate completes an action plan that addresses the family's goals. (p. 96)

1	2	3
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Indicators:

- a) _____ Objectively observes and records information about family members' behaviors and learning
- b) _____ Defines parents goals, as well as delineates steps and activities to meet those goals

Item 12.2 Candidate knows current local regulations regarding family support and education programs, child care, child abuse and neglect, and other relevant issues. (p. 97)

1	2	3
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Indicators:

- a) _____ Follows the program format for conducting home visit activities
- b) _____ Adheres to professional Mandated Reporting requirements related to abuse and neglect
- c) _____ Maintains up-to-date records on children's growth, health, behavior, and progress, as well as pertinent information on other family members

Item 12.3 Candidate knows the social service, health, and education resources of the community and uses them when appropriate. (p. 98)

1	2	3
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Indicator:

- a) _____ Refers families to relevant agencies when parents need social services or when they suspect children may have developmental challenges

Note: You may find some needed evidence for this Item during the Observe Session, if the candidate is observed discussing this with the parent.

Optional Notes: PROGRAM MANAGEMENT (Items 12.1, 12.2, 12.3 above)

Review Notes	Observation Notes

Functional Area 13: PROFESSIONALISM

Item 13.1 Works with parents and other professionals as an advocate for children and families. (p. 100)

1

2

3

Indicators:

- a) _____ Advocates for the needs of children and families
- b) _____ Works with parents and other professionals to develop effective strategies to communicate to decision makers the need for quality services

Item 13.2 Continues to seek new knowledge and deeper understanding of the home visitation field. (p. 101)

1

2

3

Indicators:

- a) _____ Seeks professional development opportunities for advancing his or her knowledge on child development, early childhood education, wellness issues, family dynamics, adult learning and public speaking

Item 13.3 Identifies and recognizes areas of own professional growth and gains the needed skills to provide high quality home visits. (p. 102)

1

2

3

Indicator:

- a) _____ Is a member of a professional organization and attends meetings, learning sessions and conferences
- b) _____ Finds ways to meet his or her own needs and maintain energy and enthusiasm

(Continued on next page)

Note to the CDA Professional Development Specialist™:

One clear sign of the candidate's professionalism is her/his completion of the *Professional Portfolio* as a requirement of the credentialing process. Therefore, the following Item should also receive a Recommended Score:

Item 13.4 Candidate has completed all requirements of the CDA Professional Portfolio in preparation for this CDA Verification Visit™. (pp. 15-21)

1		3
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3 = All Portfolio requirements met

1 = One or more Portfolio requirements were not met

(If 1, the CDA PD Specialist™ is required to add a brief note explaining the rationale and/or examples for that score)

Indicators:

- a) _____ Majority of Family Questionnaires distributed were collected
- b) _____ Six Reflective Statements of Competence were written
- c) _____ Professional Portfolio includes all of the required Resource Collection items
- d) _____ One Professional Philosophy Statement was written

Optional Notes: PROFESSIONALISM (Items 13.1, 13.2, 13.3, 13.4)

Review Notes

Observation Notes

Required Portfolio Components

If either of the following required Portfolio components do not meet requirements, you must notify the candidate at the conclusion of the CDA Verification Visit™ that she/he will receive a postcard from the Council notifying him/her of the required procedures for correcting these errors within six months of his/her *Ready to Schedule* notice.

In the spaces below, write down the reason(s) the components do not meet requirements. You will then submit this information to the Council online, along with your Recommended Scores.

1. The candidate's 120 clock hours of Professional Education meets all requirements (pp. 10-12):

☐ Yes ☐ No

If "No," please explain: _____

2. The candidate's First Aid/CPR certification meets all requirements (p. 15):

☐ Yes ☐ No

If "No," please explain: _____

For the Home Visitor CDA PD Specialist™:

Reminders to Myself to Prepare for the Reflective Dialogue

Clarifications (complete this section after the Review and Observe sessions)

After reviewing this candidate's portfolio and observing him/her conducting a home visit with a family, I may still need to ask the candidate some questions of clarification about the following topics that I was unable to read about or observe:

Professional Philosophy Statement (complete this section during the Review Session)

After reading the candidate's *Professional Philosophy Statement*, here are one or more key topics about how he/she puts her professional philosophy into practice, that I may want to bring up as I facilitate the reflective dialogue:

CDA Professional Development Specialist™ Feedback (complete this section after the Review and Observe sessions)

After reading through this candidate's *Professional Portfolio* and observing him/her working with children, I will mention the following Area of Strength and Area for Professional Growth during the reflective dialogue:

One Area of Strength

One Area for Professional Growth



CDA Verification Visit™ Reflective Dialogue Worksheet

Note to Candidate: The last step of the CDA Verification Visit™ process is the Reflective Dialogue, the culminating activity designed to support your ongoing reflection about your professional practices. Please know that the dialogue you will have with your Home Visitor CDA Professional Development (PD) Specialist™ will be kept confidential between the two of you, will not be scored and has no bearing on the award of your Home Visitor CDA® Credential. You will retain this Worksheet after the dialogue - no one else will see this worksheet unless you choose to share it. Therefore, feel free to reflect honestly and candidly about your professional strengths and areas for growth. There are no “right” or “wrong” answers in a reflective dialogue – only your commitment to your own professional growth and the goals you will set for yourself.

Step 1: Identify Areas of Strength and Areas for Future Professional Growth

In order to identify the best goals for yourself, it may be helpful to first explore different perspectives – (1) opinions from the families you serve, (2) your own thoughts and (3) feedback from your Home Visitor CDA PD Specialist™, who has just read your *Professional Portfolio* and observed you working with families. Before your CDA Verification Visit™, please read the Family Questionnaires you received. Look for trends or patterns of responses and write down, in boxes A and B below, as many areas of strength and areas for professional growth that you would like. You will complete the second and third columns during the Reflective Dialogue.

	1. Family Questionnaires (to be completed by the candidate prior to the Verification Visit)	2. Candidate Self-Reflection (to be completed by the candidate during the Reflective Dialogue)	3. Feedback From My PD Specialist (to be completed by the candidate during the Reflective Dialogue)
A What are Your Area(s) of Professional Strength?		C	E
B What are your Area(s) for Future Professional Growth?		D	F

Step 2: Identify Areas of Strength and Areas for Future Professional Growth

Now that you have listed your perceived strengths and areas for future growth, what goal or goals might you set for yourself? Is there a strength you're committed to strengthening even further? Is there an area you've identified that you are committed to improving? In the spaces below, list up to three professional goals you are committed to achieving. After writing each goal, discuss with your Home Visitor CDA PD Specialist™ steps you might take to reach that goal.

Goal #1:	Steps I could take to reach Goal #1:
Goal #2:	Steps I could take to reach Goal #2:
Goal #3:	Steps I could take to reach Goal #3:

Step 3: Commit to Achieving Your Goal(s)

I, _____, hereby commit to achieving my goal(s) in order to further develop as a professional Home Visitor and to become even more effective at serving the needs of the families of young children in my care.

_____ CDA® Candidate (sign here) _____ as witnessed by my CDA PD Specialist™ (sign here)



This worksheet is now yours to keep. Being a reflective practitioner and meeting the goals you've set for yourself is up to you, regardless of whether you are awarded your Home Visitor CDA® Credential. The Council encourages you to share your goals with a mentor, colleague or supervisor who will support you, hold you accountable for meeting your goals and celebrate with you when you have met them.

Quality Assurance Guidelines

QUALITY ASSURANCE INQUIRIES	EXAMPLES	CONSIDERATION	COUNCIL ACTION
MINOR - Violations of Council policies and procedures that, in the opinion of the Council, have little or no adverse impact on the quality of CDA Verification Visit™, validity of the assessment or the integrity of the Credential.	<ul style="list-style-type: none"> Completing the <i>Pre-Verification Visit Checklist</i> without verifying the information is accurate in your <i>Scoring Tool</i>. Contacting the candidate outside of the 48 hour window. Taking the <i>Professional Portfolio</i> home to review. 	Based upon the inquiry, staff follow-up to update and reinforce training due to self-directed minor inappropriate behavior or performance.	<p>No disciplinary action</p> <p>Corrective discussion</p>
SERIOUS - Violations of Council policy and procedures that, in the opinion of the Council, may have adverse impact on the quality of the CDA Verification Visit™, validity of the assessment or the integrity of the Credential.	<ul style="list-style-type: none"> Conducting the CDA Verification Visit™ without completing the <i>Pre-Verification Visit Checklist</i> Conducting the CDA Verification Visit™ in a language you are not proficient in OR has not been approved by the PDS Team. Completing excessive visits beyond the 3 per week minimum and no more than 2 in one day. 	Depending on the inquiry, the Council may either restrict PDS continued participation in candidate CDA Verification Visits™ or suspend the PDS for a period of time to seek additional training and reflection due to systematically or socially inappropriate behavior or actions directed toward others.	<p>Temporary monitoring action will be imposed depending on the uniqueness of the inquiry</p> <p>Corrective discussion</p>
MAJOR - Violations of Council policy and procedures that, in the opinion of the Council, have significant adverse impact on the quality of the CDA Verification Visit™, validity of the assessment or the integrity of the Credential.	<ul style="list-style-type: none"> Taking bribes and/or charging additional funds, from candidates to complete their CDA Verification Visit™. Repeat offenses of any serious or minor violations. Entering scores under false pretenses and/or not completing the CDA Verification Visit™ in accordance with Council policies and procedures. 	A major inquiry may result in suspension from participation in candidate CDA Verification Visits™ or depending on the severity/repetitiveness of the infractions(s), such as unethical behavior or criminal conduct, it may result in expulsion without the opportunity for future participation. The Council reserves the right to suspend or expel a PDS prior to administrative review for major infractions.	May include: removal from PDS Portal; deactivation; permanent removal from system

CDA Professional Development Specialist™ Independent Contractor Consulting Agreement

This document is a contract agreement between the Council for Professional Recognition (“Council”) and _____ (“Independent Contractor,” “I” or “me”) who agrees to provide independent consulting services as a *CDA Professional Development Specialist™* (“PD Specialist”). This Agreement will be effective for a two (2) year period beginning with the signed acceptance date of this INDEPENDENT CONTRACTOR CONSULTING AGREEMENT.

I. SCOPE OF WORK

The Independent Contractor understands and agrees to provide the following services in his or her role as a PD Specialist conducting a Verification Visit® that is required for all CDA® candidates seeking their *Child Development Associate®* (“CDA”) certification:

1. Review of all written and online materials provided by the Council and participate in all required PD Specialist Professional Development Instruction and Assessment sessions (current and future), which provide detailed information on the PD Specialist role.
2. Conducting the CDA Candidate *CDA Verification Visit®* evaluation process in accordance with the policies and procedures established by the Council. The *CDA Verification Visit®* process includes:
 - Connecting to the PD Specialist portal a minimum of once per week to retrieve emails related to your work as a PD Specialist.
 - Promptly (within 24 hrs.) responding to and communicating with CDA candidates regarding your availability to accept and schedule Verification Visits.
 - Conducting each mutually (CDA candidate and PD Specialist) agreed-upon and scheduled *CDA Verification Visit*.
 - Allowing a minimum of four (4) hours to complete each scheduled visit.
 - Scheduling and conducting no more than two (2) *CDA Verification Visit* “s per day and no more than three (3) *CDA Verification Visit* assessment per week.
 - Submitting to the Council all required CDA candidate assessment scores (utilizing approved Council forms, documents and online platforms), within 48 business hours

- after completing the candidate *CDA Verification Visit*® or before the candidate's six (6) month expiration deadline (whichever comes first), in accordance with Council policies and procedures.
- Maintaining original Comprehensive Scoring Instrument (CSI) scores and Pre-Verification Visit checklist for six (6) months for each candidate *CDA Verification Visit* conducted.
3. Maintaining the integrity of the candidate *CDA Verification Visit*® Process and quality of the candidate's experience, by conducting visits using the approved R.O.R. Model®, which consists of the following steps:
- **Reviewing** the contents of the candidates Professional Portfolio, training transcripts/certificates and Family Questionnaires.
 - **Observing** the candidate working with children, in the setting of their desired CDA credential, and recording criterion evidence where applicable.
 - **Reflecting** with the candidate, focusing on the candidate's areas of strength or growth found in the portfolio or seen during the observation.
4. Administering, under special pre-approved circumstances, the paper exam process for CDA candidates in accordance with the policies and procedures established by the Council.

II. INDEPENDENT CONTRACTOR SERVICES

As an Independent Contractor operating in the role of a PD Specialist, I further understand and agree that:

1. I am not permitted to charge CDA candidates or related Programs any additional fees or request reimbursement for expenses when conducting a *CDA Verification Visit*® with a CDA candidate. Should I violate this policy, I understand that my services as a *CDA Professional Development Specialist*™ under this Agreement will be terminated immediately and I will not be permitted to reapply.
2. I will notify the Council and explain in detail if I have conflicts of interest that may make it inappropriate to serve as a *CDA Professional Development Specialist*™ for a CDA candidate.
3. All CDA candidate information, *CDA Verification Visit*® data, *CDA Verification Visit*® results, the online PD Specialist Portal, online passwords, and other data that I may handle while serving as a *CDA Professional Development Specialist*™ are confidential, and may not be copied, revealed, or shared with any unauthorized party.
4. I will protect the privacy rights of CDA candidates and the Council in all information disclosed to me about the candidates acquired before, during and after the CDA assessment process. All confidential information will be maintained in strict confidence.

5. I will promptly notify the Council when I am no longer available to serve as a PD Specialist and understand that once my departure from the PD Specialist Program is effective, my access to the PDS portal and my name and contact information in the PD Specialist Directory will be removed.
6. I will handle the CDA assessment and testing instruments in an ethical manner and agree to protect the confidentiality of the candidate's Comprehensive Scoring Instrument (CSI) and the *CDA Verification Visit* and exam scores submitted.
7. I understand that Council staff will be enacting a Quality Assurance Process to randomly monitor the services outlined in this Agreement. I agree to fully participate in the Council's Quality Assurance Process and cooperate with Council staff tasked with that responsibility.
8. I also understand that the Council will treat my personal information as confidential and will use it for internal administrative purposes only, and will not share it with third parties except on a "need to know" basis in furtherance of the Council's business. For either party, confidential information may be provided to a third party if it is pursuant to a valid order of a court or other government body.

III. COMPENSATION

As an Independent Contractor, I agree to accept an honorarium of \$100 per candidate *CDA Verification Visit*® or \$150 per paper exam administration, in accordance with Council policies and procedures, and understand and acknowledge that during the term of this Agreement the amount of the honorarium may change.

I understand CDA candidates may select the person who serves as their *CDA Professional Development Specialist*™.

As an Independent Contractor, I understand that this Agreement does not guarantee I will be selected by CDA candidates to serve as their CDA PD Specialist. I further understand that this Agreement does not in any way guarantee any minimum number of *CDA Verification Visit* evaluations or honorarium amounts paid to me in any particular period of time.

I understand that in addition to signing this Agreement, I will need to provide the Council with my tax identification number (social security number) and mailing address to expedite processing of 1099 tax forms in compliance with all applicable IRS guidelines.

I understand that my honorarium will be provided to me as an ACH payment, deposited by automatic transfer directly into my bank account, and I will need to provide the Council (through a secure third-party processor) with my banking information to facilitate receipt of those funds. The Council will process my honorarium within 30 days of receipt of all required forms and information related to completion of a *CDA Verification Visit*™ or administration of a paper exam.

I understand that I am required to complete all forms and provide information necessary to process my honorarium immediately upon completion of my first *CDA Verification Visit™* or paper exam (whichever comes first) and submission of related candidate scores.

I understand that failure to provide the payment information requested will delay processing of my honorarium and restrict my ability to conduct further *CDA Verification Visit™* evaluations.

I understand and agree that the Council may withhold or delay my honorarium payment if I improperly prepare the requisite information related to a *CDA Verification Visit*, or if I improperly deliver the *CDA Verification Visit* services and/or fail to live up to other processes and procedures described in this Agreement or in the PD Specialist guideline materials.

IV. OTHER TERMS AND CONDITIONS

As an Independent Contractor serving the Council and CDA candidates in the role of *CDA Professional Development Specialist™*, I agree to the following:

1. To serve the Council as an independent contractor and not as an officer or agent, and further understand:
 - As an independent contractor, I am not an employee of the Council and therefore, not entitled to any benefits or rights the Council provides to its employees, such as employee health insurance, disability insurance, paid vacations, sick or other leave, retirement plans, health plans under the Affordable Care Act, or premium "overtime pay."
 - As an independent contractor, I am not eligible for Worker's Compensation or Unemployment insurance coverage. I understand and acknowledge that it is my responsibility to provide any worker's compensation and unemployment compensation insurance as well as make payments for FICA, FUTA, income tax withholding, and other legally required payments.
2. As an independent contractor and under the terms of my contractual work as a *CDA Professional Development Specialist™*, I am not in any way prevented from offering my consulting services to others, including the public, during the time that I am not performing work as a *CDA Professional Development Specialist™* under this Agreement, which other consulting services do not conflict with the services I provide the Council through the *CDA Professional Development Specialist™* Program.
3. As an independent contractor, I understand and agree that it is my responsibility to pay all expenses related to my contractual work as a *CDA Professional Development Specialist™*, and to provide all supplies needed for execution of my PD Specialist contractual work, including, but not limited to, transportation, equipment, supplies, a valid e-mail address, and reliable internet access. I understand that I will not be using any equipment, facilities, or transportation of the Council but will be providing my own.

4. As an independent contractor, I will be responsible for the payment of all taxes of every kind applicable to all sums paid to me. I also understand that the Council will follow the IRS guidelines and report all payments made to me according to the rules and regulations established by the IRS. I understand that I may find IRS guidance on my tax obligations as a self-employed independent contractor at "<https://www.irs.gov/businesses/small-businesses-self-employed/self-employed-individuals-tax-center>".
5. I understand that all disputes, claims, or disagreements between the Council and me that may arise from this Agreement or my contractual work as a *CDA Professional Development Specialist™* will be resolved by direct good faith discussions between a senior staff representative of the Council and me. If the matter is not resolved through good faith direct discussions, it will be submitted to non-binding mediation administered by the American Arbitration Association under its Commercial Mediation Rules at a location to be determined by agreement. If the parties do not reach resolution in mediation, then, upon notice by either party to the other, all disputes, claims, or disagreements shall be finally settled by arbitration administered by the American Arbitration Association in accordance with the provisions of its Commercial Arbitration Rules, and any arbitration hearing will take place in Washington DC; provided that the dispute resolution procedures of this Section IV.5 shall not apply on a multiple-party or class-wide basis.
6. I understand that this Agreement may be terminated for any reason or no reason by a written notice of either party, effective as of the date of the delivery of the written notice.
7. I understand that the Council will defend, indemnify and hold me harmless against any liability arising from the negligence of the Council or any claim by any third party against me arising from or related to any claimed violations of the Council.
8. As an independent contractor, I agree to defend, indemnify and hold the Council harmless against any liability arising from my negligence or any claim by a third party against the Council arising from or related to criminal or claimed violations of local, state or federal laws in the performance of my responsibilities as a PD Specialist.
9. I understand that all prior negotiations between the parties are merged in this Agreement, and there are no understandings or agreements other than those incorporated or referred to in this Agreement. This Agreement may not be modified except through written communication signed by the CEO of the Council or an authorized designee of the Council.
10. I understand that this Agreement may be amended by written notice from the Council if the amendment will apply to all *CDA Professional Development Specialists*.
11. The parties expressly agree that no party may assign this Agreement without the written consent of the other.

CDA Professional Development Specialist™ Volunteer Agreement

This document is a contract agreement between the Council for Professional Recognition (the Council) and _____ (“Volunteer,” “I,” or “me”) who agrees to provide independent consulting services as a Volunteer *CDA Professional Development Specialist™* (“PD Specialist”). This Agreement will be effective for a two (2) year period beginning with the signed acceptance date of this VOLUNTEER AGREEMENT.

I. SCOPE OF WORK

Volunteer understands and agrees to provide the following services in his or her role as a PD Specialist supporting the assessment of candidates seeking their *Child Development Associate®* (“CDA”) certification:

1. Review of all written and online materials provided by the Council and participation in all required PD Specialist professional development instruction and assessment sessions (current and future) which provide detailed information on the PD Specialist role.
2. Conducting the CDA® candidate *CDA Verification Visit®* evaluation process in accordance with the policies and procedures established by the Council. The *CDA Verification Visit®* process includes:
 - Connecting to the PD Specialist portal a minimum of once per week to retrieve emails related to your role as a PD Specialist.
 - Promptly (within 24 hours) responding to and communicating with CDA candidates regarding your availability to accept and schedule *CDA Verification Visits*.
 - Conducting all mutually (CDA candidate and PD Specialist) agreed-upon and scheduled *CDA Verification Visits*.
 - Allowing a minimum of four (4) hours to complete each scheduled visit.
 - Scheduling and conducting no more than two (2) *CDA Verification Visit®* evaluations per day and no more than three (3) *CDA Verification Visit®* evaluations per week.

- Submitting to the Council all required candidate assessment scores (utilizing approved Council forms), within 48 business hours after completing the candidate *CDA Verification Visit*® evaluation or before the CDA candidate's six (6) month expiration deadline (whichever comes first), in accordance with Council policies and procedures.
 - Maintaining original Comprehensive Scoring Instrument (CSI) scores and Pre-Verification Visit Checklist for six (6) months for each candidate *CDA Verification Visit*® evaluation conducted.
3. Maintaining the integrity of the candidate *CDA Verification Visit*® process and quality of the Candidate's experience, by conducting visits using the approved R.O.R. Model®, which consists of the following steps:
- **Reviewing** the contents of the candidates Professional Portfolio, training transcripts/certificates and Family Questionnaires.
 - **Observing** the candidate working with children, in the setting of their desired CDA credential, and recording criterion evidence where applicable.
 - **Reflecting** with the candidate, focusing on the candidate's areas of strength or growth found in the portfolio or seen during the observation.
4. Administering, under special pre-approved circumstances, the paper exam process for CDA candidates in accordance with the policies and procedures established by the Council.

II. VOLUNTEER SERVICES

As a volunteer operating in the role of a PD Specialist, I further understand and agree that:

I am not permitted to charge CDA candidates or related Programs any additional fees or request reimbursement for expenses when conducting a *CDA Verification Visit*® or paper exam with a CDA candidate. Should I violate this policy, I understand that my services as a *CDA Professional Development Specialist*™ under this Agreement will be terminated immediately and I will not be permitted to reapply.

1. I will notify the Council and explain in detail if I have conflicts of interest that may make it inappropriate to serve as a PD Specialist for a candidate.
2. All CDA candidate information, *CDA Verification Visit*® data, *CDA Verification Visit*® results, the online PD Specialist Portal, online passwords, and other data that I may handle during my volunteer service as a PD Specialist are confidential, and may not be copied, revealed, or shared with any unauthorized party.
3. I will protect the privacy rights of CDA candidates, and the Council in all information disclosed to me about the candidates acquired before, during and after the CDA assessment process. All confidential information will be maintained in strict confidence.

4. I will promptly notify the Council when I am no longer available to serve as a PD Specialist and understand that once my departure from the PD Specialist Program is effective, my access to the PDS portal and my name and contact information in the PD Specialist Directory will be removed.
5. I will handle the CDA assessment and testing instruments ethically and agree to protect the confidentiality of the candidate's Comprehensive Scoring Instrument (CSI) and the paper exam and *CDA Verification Visit®* scores submitted.
6. I understand that Council staff will be enacting a Quality Assurance Process to randomly monitor the services outlined in this Volunteer Agreement. I agree to fully participate in the Council's Quality Assurance Process and cooperate with Council staff tasked with that responsibility.
7. I also understand that the Council will treat my personal information as confidential and will use it for internal administrative purposes only and will not share it with third parties except on a "need to know" basis in furtherance of the Council's business. For either party, confidential information may be provided to a third party if it is pursuant to a valid order of a court or other government body.

III. NO COMPENSATION

As a volunteer, I understand that I am not entitled to and will not be compensated monetarily for my services by the Council, CDA candidates or any related programs I may become involved with because of the services I render under this Volunteer Agreement.

I understand CDA candidates may select the person who serves as their *CDA Professional Development Specialist™*.

As a volunteer, I understand that this Volunteer Agreement does not guarantee I will be selected by CDA candidates to serve as their PD Specialist. I further understand that this Volunteer Agreement does not in any way guarantee assignment of any minimum number of CDA Verification Visit® evaluations or paper exams to be administered in any particular time period.

IV. OTHER TERMS AND CONDITIONS

As a volunteer serving the Council and CDA candidates in the role of PD Specialist, I agree to the following:

1. To serve the Council as a volunteer independent contractor, and not as an employee, officer or agent, and further understand:

- As a volunteer, I am not an employee of the Council and therefore, not entitled to any benefits or rights the Council provides to its employees, such as employee health insurance, disability insurance, paid vacations, sick or other leave, retirement plans, health plans under the Affordable Care Act, or premium "overtime pay."
- As a volunteer, I am not eligible for Worker's Compensation nor Unemployment Insurance coverage.
- As a volunteer and under the terms of my volunteer work as a PD Specialist, I am not in any way prevented from offering my services to others, including the public, during the time that I am not performing work as a PD Specialist under this Volunteer Agreement, when other services do not conflict with the services I provide the Council through the PD Specialist Program.

2. To pay all expenses related to my volunteer work as a *CDA Professional Development Specialist™*, and to provide all supplies needed for execution of my PD Specialist work, including, but not limited to, transportation, equipment, supplies, a valid e-mail address, and reliable internet access.

- I further understand that I will not be using any equipment, facilities, or transportation of the Council, but will be providing my own.

3. I further understand and agree that:

All disputes, claims, or disagreements between the Council and me that may arise from my volunteer work as a PD Specialist will be resolved by direct good faith discussions between a senior staff representative of the Council and me. If the matter is not resolved through good faith direct discussions, it will be submitted to non-binding mediation administered by the American Arbitration Association under its Commercial Mediation Rules at a location to be determined by agreement.

If the parties do not reach resolution in mediation, then, upon notice by either party to the other, all disputes, claims, or disagreements shall be finally settled by arbitration administered by the American Arbitration Association in accordance with the provisions of its Commercial Arbitration Rules, and any arbitration hearing will take place in Washington DC; provided that this Section IV.B.2 shall not apply on a multiple-party or class-wide basis.

4. I understand that this Agreement may be terminated for any reason or no reason by a written notice of either party, effective as of the date of the delivery of the written notice.

5. I understand that the Council will defend, indemnify and hold me harmless against any liability arising from the negligence of the Council or any claim by any third party against me arising from or related to any claimed violations of the Council.

6. As a Volunteer, I agree to defend, indemnify and hold the Council harmless against any liability arising from my negligence or any claim by a third party against me arising from or related to criminal or claimed violations.
7. I understand that all prior negotiations between the parties are merged in this Agreement, and there are no understandings or agreements other than those incorporated or referred to above.
8. This Agreement may not be modified except through written communication signed by the CEO of the Council or an authorized designee of the Council.
9. Understand that this Agreement may be amended by written notice from the Council if the amendment will apply to all PD Specialists.
10. The parties expressly agree that no party may assign this Agreement without the written consent of the other.



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