

# Listening and Learning:

REIMAGINING THE CDA® PROCESS

By Dr. Calvin E. Moore, Jr.





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# Executive Summary

## About the Council for Professional Recognition

The Council for Professional Recognition is a leader in the credentialing of early childhood educators. For more than four decades, the Council has responded to the evolving best practices in early childhood education, advances in technology, and the growing diversity of individuals who are pursuing ECE as a career for the betterment of our profession, our educators and our children. The Council's mission is to promote improved performance and recognition of professionals in the early childhood education of children ages birth to 5 years old. 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.

The Council's key purpose in administering the CDA credential has long been to assess the knowledge and skills of professionals in the early childhood education field. Since 1985, it has issued more than 900,000 Child Development Associate® (CDA) credentials to candidates who can meet the CDA® Competency Standards, a proven measure of performance in early childhood education (ECE).

## A History of Innovation

In 2013, the CDA went through its first major change with the launch of the CDA 2.0 initiative. This effort updated the CDA knowledge base and added new elements, such as candidate reflection and creation of the Professional Development Specialists network. In addition, the CDA embraced technology, making it easier for candidates to apply online and manage their credentialing experience. The CDA 2.0 also made the entire credentialing process more user-friendly through its updates to the standards books, observation tool, and applications. Renewals became easier to navigate and provided more support to candidates.

In 2020, an unprecedented pandemic challenged and changed the entire world and hit the ECE field hard. The onset of COVID-19 and the challenges that ensued required the Council to address barriers to multiple aspects of the process of obtaining a credential. Many early education centers temporarily shut down or were severely understaffed. State and local governments placed new capacity limits on the number of individuals who were allowed inside centers, and, in many cases, visitors were not permitted to enter these facilities at all. For the Council, this

meant that Professional Development Specialists could not enter centers to conduct CDA Verification Visits®, a critical component of the CDA credentialing process, and therefore credentials could not be awarded. For many early childhood programs, this meant that they could not find qualified educators to fill vacant positions. The unique situation caused by the pandemic prompted the Council to develop new protocols for certain aspects of the CDA credentialing process, such as the verification visit, to go virtual. The Council not only sought a comprehensive solution to those challenges, but also to reimagine the systems and processes undergirding its work and stakeholder engagement.

At the same time, the Council was going through a change in leadership, with a new interim CEO who began to assess all aspects of the Council's operations during this global crisis. He challenged the Council's staff members to think big about their processes and design something "futuristic, ingenious, cutting edge, and new," to start the work of turning a crisis into an opportunity. He urged the Council to put stakeholders first during the redesign and to embed a customer focus in all that it develops.



In addition, to increase the support of all our candidates through this challenging time, the Council launched a new customer experience initiative designed to enhance the level of customer service offered by Council staff and customer support center agents. As a part of the *White Glove Customer Service* initiative, all Council employees and customer support center agents received customer service training from national experts, including customer service trainer and author, Jeff Toister.

## The CDA Process Reimagined

To begin this journey, the Council created a Blue Ribbon Panel composed of thought leaders in the field. The panel members shared key insights and knowledge that prompted the Council to think more deeply about how to meet the sector's changing needs resulting from COVID-19, specifically the need for more qualified professional educators who've earned CDAs. Panelist feedback confirmed that enhancing the CDA process to include virtual verification visits and other adaptations to credentialing would be a primary way to achieve the goal of more equitable access to the CDA. This is where the Reimagining Initiative began.

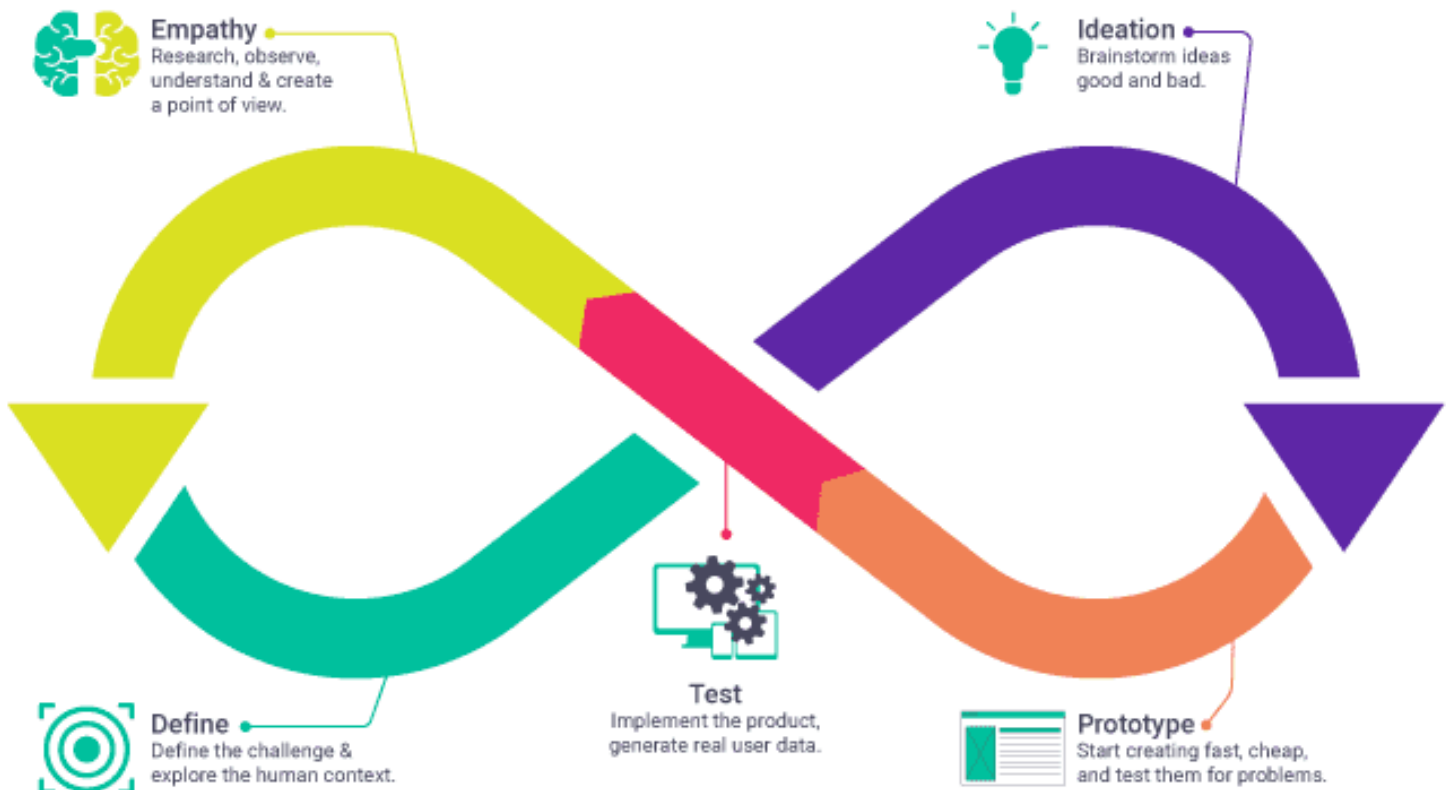
This report takes a closer look at the projects the Council embarked on as part of the Reimagining Initiative. Each was strategically selected for its ability to improve access to the CDA and focused on improving and innovating around areas of high stakeholder touchpoints, from stakeholders' first interaction on the website through credentialing. The projects covered in this report include the newly designed website, the updated CDA exam blueprints completed by conducting a Job Analysis Study, the development of the third edition of *Essentials for Working with Young Children*, and the reimagining of the entire CDA credentialing process.

To conduct the Reimagining the CDA Process Initiative, the Council established a collaboration with BCT Partners to implement a design-thinking approach in addressing the Council's needs. Design



thinking is an iterative process to solve complex problems by focusing on the user, challenging assumptions, and redefining problems to identify alternative strategies and solutions that might not be instantly apparent based on an organization's initial level of understanding. The design thinking framework follows an overall flow that traverses five stages: (1) empathize, (2) define, (3) ideate, (4) prototype, and (5) test. These stages reflect the approach's iterative nature and progression from divergent to convergent thinking. Figure 1 below shows both the overall framework, phases, and hallmarks of the process. This design-thinking approach seeks to understand CDA® stakeholders, challenge accepted assumptions, and redefine problems to identify alternative strategies and solutions.

## 5 Stages of Design Thinking



Springboard, January 2023

The Council divided the work into three phases. Phase A included stages 1, 2, 3, website development, and conducting a job analysis; Phase B included stages 4, 5, equity review of the Essentials for Working with Young Children and the National CDA Competency Standards and the CDA exam refresh and Phase C includes Productionize Solutions and Technical Assistance and Capacity Building. A recommended list of enhancements to the CDA assessment process was submitted to Council leadership for consideration. An important deliverable of the project was the development of a logic model of the CDA assessment system. The report also includes a implementation timeline and next steps. In January 2022, the W.K. Kellogg Foundation provided a grant to support this initiative.

## Logic Model Framework

The logic model utilized in the analysis and construction of findings in this report was framed in a manner that reflected the process and results of the credentialing process. The logic model was comprised of four major sections (See Figures 1 and 2): Context, Inputs, Activities to Results, and Outcomes to Impact. Each section informed various aspects of the analytic process.

FIGURE 1. CDA® LOGIC MODEL

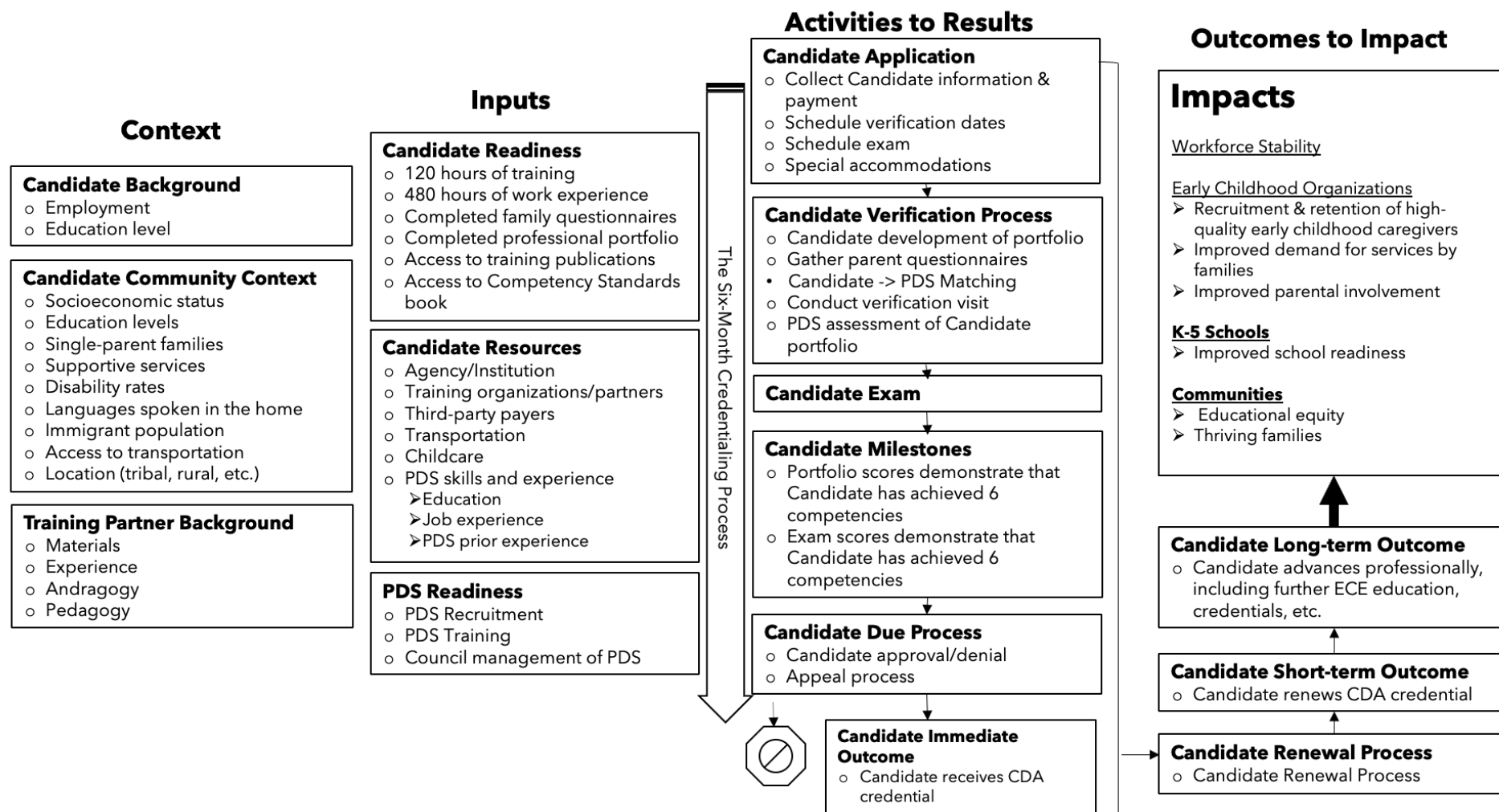
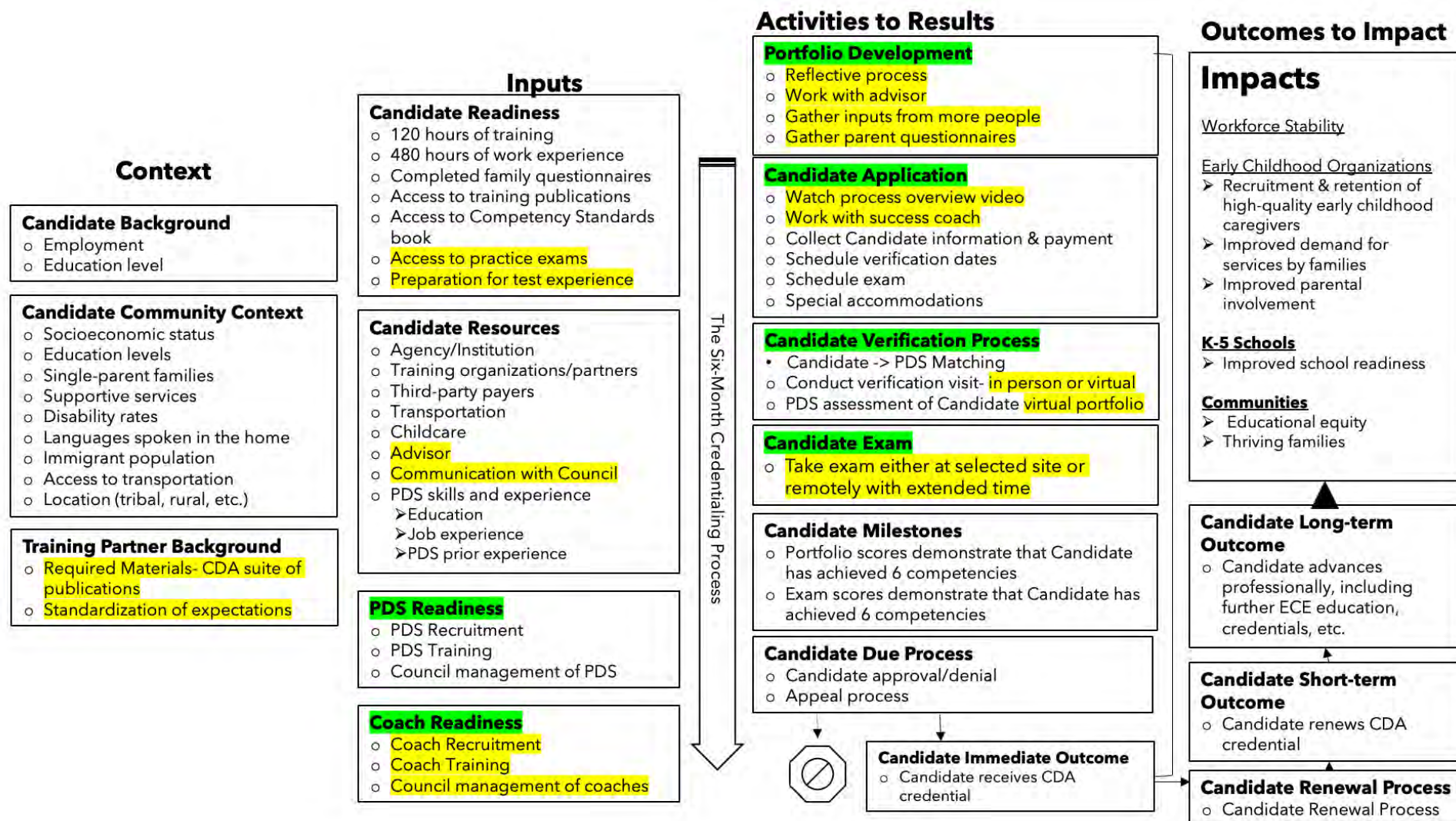




FIGURE 2. CDA® LOGIC MODEL - WITH PROPOSED IDEAS



# BCT Phase I Report: Recommendations

## IMPACTS AND RECOMMENDATIONS

Based on the findings, several recommendations emerged in alignment with the logic model. The recommendations at this stage in the process included methods by which the Council could most effectively harness their strengths and address challenges discovered throughout the credentialing process. These recommendations served as idea starters for the ideation process (detailed in the next section).

### Impact Design

In this area, BCT recommends making YourCouncil and survey data accessible and useful to system leaders, stakeholders, and researchers. This will ensure that findings and trends can be immediately processed and applied to decision-making in a meaningful way. BCT also recommends strengthening online programing, resources, and referrals for CDA® renewal, and ongoing professional development. This will allow candidates, PDSs, and other stakeholders to directly, and repeatedly, access the resources necessary to be successful.

### Professional Development Specialist Design

In this area, BCT has amassed four recommendations based on the current structure of the PDS role:

- PDSs should be segmented into levels based on their amount of experience and prior experience as a PDS. These characteristics are most associated with and predictive of candidate success in credentialing and should be prioritized in the matching process.
- Compensation tiers should be developed based on experience, education, location, and languages spoken. This will allow PDSs to both be aligned in terms of ability and compensation, but also create incentivization for professional growth and development.

- Data-driven geospatial tools should be developed to find and match PDS and candidates, which will simplify and unencumber the matching process.
- A PDS-to-PDS mentoring program should be developed, with compensation for mentors. This will serve to fortify the compensation tier system and incentivize professional improvement.

The Council might also consider restructuring the PDS role completely to account for the divergent needs both to verify competencies as well as provide support throughout the process.

### Profiling Design

In this area, BCT recommends integrating candidate profiles into YourCouncil data, developing individual candidate progress monitoring and recommender tools, and generating profile-specific evaluation reports and dashboards. These supports will allow all candidates and relevant stakeholders to track progress, needs, and professional development in a data-driven manner.

### Training Design

In this area, BCT recommends monitoring, evaluating, and sharing training results with training partners, and providing programming and/or resource and referrals for candidates with low levels of training. This approach will ensure that candidates receive immediate supports based on their unique needs, and that partners and relevant stakeholders are directly engaged in that process. Creating synergy between partners and the Council may benefit candidates more strongly in the long term.

### Application Design

In this area, BCT recommends improving the application design and employing well- trained application support staff within an online/virtual screening process to minimize costs. The application re-design should target the specific pain points identified by both monolingual and bilingual candidates to meet the diverse needs of all candidates.



Bringing in support staff in tandem with this re-design will ensure that fewer barriers are encountered during all points in the application process.

### **Verification Design**

In this area, BCT recommends designing a virtual verification visit program, developing an online PDS-to-Candidate coordination and communication tool/system, developing a real-time evaluation dashboard of PDS support, communication, and reflective dialogue, and developing a digital portfolio tool/application. This would allow for candidates and PDS's to improve their communication through lines, engage in more meaningful dialogue, make data-driven decisions, and demonstrate their knowledge and growth in a more structured manner, targeted to their individual needs.

### **Exam Design**

In this section, BCT recommends developing an online proctored exam option, develop a non-timed exam option to those who qualify, and revise exam accommodation guidelines to reduce barriers for non-English candidates. Given that exam barriers were most strongly experienced by bilingual candidates, these recommendations not only allow for all candidates to receive targeted support in the process, but they also foster inclusion. Many candidates found current exam structures to lack utility, and these recommendations ensure those of all backgrounds have a more equitable chance at success in the exam.

### **Renewal Design**

In this section, BCT recommends creating incentives for renewal (which would encourage more candidates to complete the renewal process successfully), and to develop an automated communication tool to communicate with eligible candidates. This would ensure that they clearly receive the information needed to review, and stay engaged, which has benefits beyond short- and long-term outcomes.





# BCT Phase II Report: Recommendations

## RECOMMENDATIONS

Based on the feedback heard during the focus groups, as well as considerations of the needs illuminated through the previous analysis of experiences, BCT recommends the Council prioritize pursuing the following ideas:

- **Electronic Portfolio:** This idea was well received by members of all groups. CDAs, PD Specialists, and Partners believe this idea could improve the credentialing process significantly for many candidates, while also improving the PD Specialist review process.
- **Application Enhancements:** Focus group participants across all groups widely approved of the ideas to enhance the application. Given the feedback from many CDAs and applicants that the current application presents challenges, creating a user-friendly application experience that presents information in simple and visual ways will likely reduce significant barriers for many applicants to earning their credential.
- **Chatbots:** While there is some skepticism about the usefulness of an artificial intelligence chatbot answering questions, the primary frustration articulated by CDAs, PD Specialists, and other stakeholders has been challenges communicating with the Council. Chatbots integrated into a communication pipeline could help streamline communication processes, allowing candidates, PD Specialists, and other stakeholders to find information they need and be able to reach Council staff when necessary.
- **Verification Visit Alternatives:** It is in the Council's interest to implement at least one alternative to the current verification visit process, and therefore BCT recommends pursuing further research and analysis into both simulations and options for providing additional forms of evidence.
  - **Simulation Verification Visits:** One of the Council's primary challenges in recent years, since the start of the pandemic, particularly, has been meeting the demand for verification visits. CDAs, particularly those who have been through the credentialing process in recent years, feel strongly that there should be alternative options to demonstrate competencies virtually with a more efficient logistical process. Additionally, while a simulation would not capture the particularities of an individual's work environment, it might help make the verification process more equitable by having all candidates demonstrate competencies in the same, or similar, environment.
  - **Additional Forms of Evidence:** Similar to the rationale for pursuing simulations, the option of having candidates provide additional forms of evidence could help reduce the strains in the process and obstacles to earning a CDA credential for many candidates. The advantage to this option is that it could allow candidates to demonstrate their competencies in various ways, as well as capture themselves in their actual work environments. Additionally, there could be an opportunity to leverage the same technology as an electronic portfolio or find ways to link the parts of the process, if desired.
- **Auto-Assign PD Specialist:** This idea was received with mixed responses by candidates and PD Specialists but would most likely make the PD Specialist matching process more efficient and simplified for both candidates and PD Specialists. The concerns about this idea can be mitigated by including selection criteria that would match a PD Specialist to a candidates based on more characteristics than just geography.
- **Support Coach:** Most CDAs were enthusiastic about the introduction of support coaches to the credentialing process. This role would help to address some of the most significant pain points many candidates (and PD Specialists) experience,

including scheduling visits, scheduling exams, and challenges with communication. Designated support coaches to whom candidates can direct questions would likely improve communication frustrations. Further, support coaches who are tracking and proactively communicating with candidates in the process- particularly those experiencing challenges, stuck at a particular point, or likely to need support based on contextual factors- could improve the experience and likelihood of completing the credentialing process for many candidates.

- **Exam Preparation Videos & Practice Exams:**

For some segments of the candidates, the anxiety related to the exam proved to be the biggest hurdle to earning their CDA. CDAs across all groups were excited about the introduction of practice exams to help prepare to take the test. Videos to prepare for the process could be a valuable- and relatively simple- tool to assist some of the candidates for whom the exam creates the largest barriers.

- **Remote Exams:** Not only does the exam create anxiety for many candidates, but there are also significant logistical challenges for many candidates

to get to the exam. Introducing a remote exam option could help address challenges related to finding a testing site for those who might live far from one and/or do not have reliable transportation. Additionally, remote exams have become increasingly common and could be a feasible solution for the Council to offer to address a significant barrier for many.

- **Extended Time on Exams:** The time limit of the exam is one factor that creates anxiety for many candidates. The Council has also articulated that the time limit does not necessarily help assess whether a candidate knows the material and should earn their credential. Offering more time on the exam would reduce barriers for candidates who might, in turn, be more likely to succeed in earning their credential.
- **New Customer Relationship Management (CRM) system:** The new YourCouncil system will focus on improving business relationships with all stakeholders and create new credentialing efficiencies and enhance the overall customer experience.





## Report Organization

The final report is organized in the following manner:

- The Council's Final Report
- Appendix 1: BCT Phase I Report
- Appendix 2: BCT Phase II Report
- Appendix 3: W.K. Kellogg Foundation Report
- Appendix 4: Blue Ribbon Executive Summary



# CDA®: A Legacy of Innovation

*“A good teacher can inspire hope, ignite the imagination and instill the love of learning.”*

—Brad Henry, former governor of Oklahoma and a strong proponent of early childhood education

Successful groups “use a crisis to crystallize their purpose,” author Daniel Coyle pointed out in *The Culture Code*, a roadmap for solving problems and driving positive change. Coyle’s *New York Times* bestseller came out in 2018, just a few years before the world confronted COVID, an especially novel crisis. The pandemic hit the early learning field hard as it forced child care programs to close and caused many early childhood teachers to flee the field. The crisis also led to a turning point at the Council for Professional Recognition, the Washington, DC, nonprofit that administers the Child Development Associate® (CDA) Credential™. Now! New! Next! became the Council’s battle cry as it embarked on a campaign to reimagine its flagship credential and make the CDA® even more faithful to its purpose: credentialing early childhood teachers who really can inspire hope, ignite the imagination and instill the love of learning in all young children.

Reaching this goal has required the Council to take constant steps to learn more about the early learning sector and strive to keep teachers on the cutting edge of their field. The Council’s mission also has demanded the imagination to come up with responses to the broad social issues that affect children, their families and the teachers who support them. And as the Council works to reimagine the CDA process, it draws inspiration from a long, rich past of innovation. Since its beginning nearly 50 years ago, the CDA has constantly adapted in response to challenges and change while staying true to a core conviction: “Whatever their past history or present condition, all kinds of Americans can contribute to their country,” as President Lyndon Baines Johnson said when he declared war on poverty in 1964.<sup>1</sup> And quality early education is the engine of equity that can give every child a fair shot at success.

America’s low-income children are “the inheritors of poverty’s curse and not its creators.” So, “unless we act, these children will pass it on to the next generation

like a family birthmark,” LBJ warned.<sup>2</sup> And his response was to launch Head Start as part of his Great Society program to enhance civil rights by building equity for all, beginning in the first years of life. And equity in early education depends on qualified, competent teachers, as progressive educational thinkers have long understood. In 1971, a group of leading education experts convened and came up with a way to provide a qualified early childhood workforce for Johnson’s massive national program. That was the start of a new professional credential: the CDA.

With federal funding, the CDA Consortium and Bank Street College administered the CDA, leading to the award of the first credential in 1975. Over the next decade, the demand for the CDA grew so much that the U.S. Department of Health and Human Services worked with the National Association for the Education of Young Children to establish the Council for Professional Recognition, a new nonprofit charged with overseeing the credential.

Since then, the Council has constantly transformed the CDA to meet society's changing demands. The Council has expanded its multilingual content and adapted its training to recruit a more diverse early childhood workforce for an increasingly diverse nation. The Council has added coursework that puts a focus on early learning, not simply child care, as brain science proved the importance of the first thousand days for lasting success in school and life. It

has strengthened the credentialing process by adding components like candidate self-reflection and built a network of Professional Development Specialists who assess CDA candidates' competence and performance in the classroom. In recent decades, the Council has also embraced the use of technology to make it simpler for candidates to apply online and manage their progress toward earning the credential.<sup>3</sup>

## Confronting the Child Care Crisis

*"You need imagination to imagine a future that doesn't exist."*

—Azar Nafisi, Iranian American writer and professor

By 2020, over 800,000 educators worldwide had reached this milestone and envisioned rosy futures in the early childhood field. No one imagined the onset of COVID, a cataclysm that led to a crisis in the early learning field and deepened problems that already beset the profession in a nation that has always been without a solid child care system. Child care in America is costly and beyond the means of

many families it's meant to serve. Even when families can afford child care, they confront long wait lists and limited spaces that may not meet their needs. Some parts of the country are child deserts where there's a glaring lack of programs, and it has become increasingly hard for providers to recruit and retain high-quality teachers—all issues brought to the forefront by the pandemic.



COVID forced centers to close and led millions of parents to leave their jobs due to the lack of child care they needed to go to work. As talk of the child care crisis filled the news, the public became keenly aware of the vital role early childhood teachers play in serving the workforce of both today and tomorrow. Without competent care and instruction, many children fell behind, as they were doing when LBJ resolved to address their plight by founding Head Start. The CDA was the answer to the teacher shortage in those days—and it also seemed a strong solution to the more recent plummet in the ranks of the early childhood profession. So, in April 2021, the Council embarked on a sweeping effort to reimagine the credentialing process by putting access and equity first. The goal was to bring more committed, highly qualified teachers into the classroom when they were needed more than ever before.

Widespread recognition of their vital role was the upside of COVID for the early childhood field. It was time to “stop calling child care a crisis and call it an opportunity,” as *Forbes* magazine pointed out.<sup>4</sup> Challenging times can be the best times for companies to explore their customers’ unmet needs and place them at the center of strategies to innovate and evolve for the new normal ahead. Companies with the foresight to think ahead move from the “one day at a time focus to a post-crisis and long-term focus by adopting new practices and measures that will improve their service in the long run,” explained Kaizen Institute, a consultant to companies worldwide.<sup>5</sup> And the Council took this forward-thinking approach as it addressed another problem that had preceded the pandemic: the failure of 3 in 10 CDA candidates to complete the credentialing process.<sup>6</sup>

## Disruption and Design

*“If you’re not trying to do something better, then you’re not focused on the customer, and you’ll miss the possibility of making your business great.”*

—Jonathan Ive, former chief product designer at Apple

As the Council began to envision new ways to address the problem, it drew on the tactics of design thinking, an approach to innovation that blends people’s needs, the possibilities of technology and the requirements of business. It leads you to empathize with your users, define their needs, create a prototype and then repeatedly test. Taken together, these steps help you think outside the box, as they did at Apple. During Ive’s tenure there, the company launched a dazzling array of groundbreaking products, including every “i” product created in the past two decades.<sup>7</sup> And Apple

isn’t the only well-known company that’s relied on design thinking to grow its consumer base.

Design thinking has become the credo for many big businesses that want to connect better with the customers they serve. Google has a formal process for brainstorming that helps them rapidly solve problems and has built “Google Garages” where employees partner with customers to experiment with new ideas, strategies that led to Google News, Gmail, and AdSense. IBM has set up an in-house innovation lab where employees use design thinking to help clients



tackle real-world business problems, leading to clear financial gains for the companies they serve. And former PepsiCo CEO Indra Nooyi transformed the world's second-largest food and beverage company through design thinking. Looking at the company's

products as a mom instead of a CEO gave her a more human-centered perspective to the product line up, led her to introduce more nutritious foods, and work to change PepsiCo's culture so employees would put consumers at the center of every decision.<sup>8</sup>

*“We are at a critical point where rapid change is forcing us to look not just to new ways of solving problems but to new problems to solve.”*

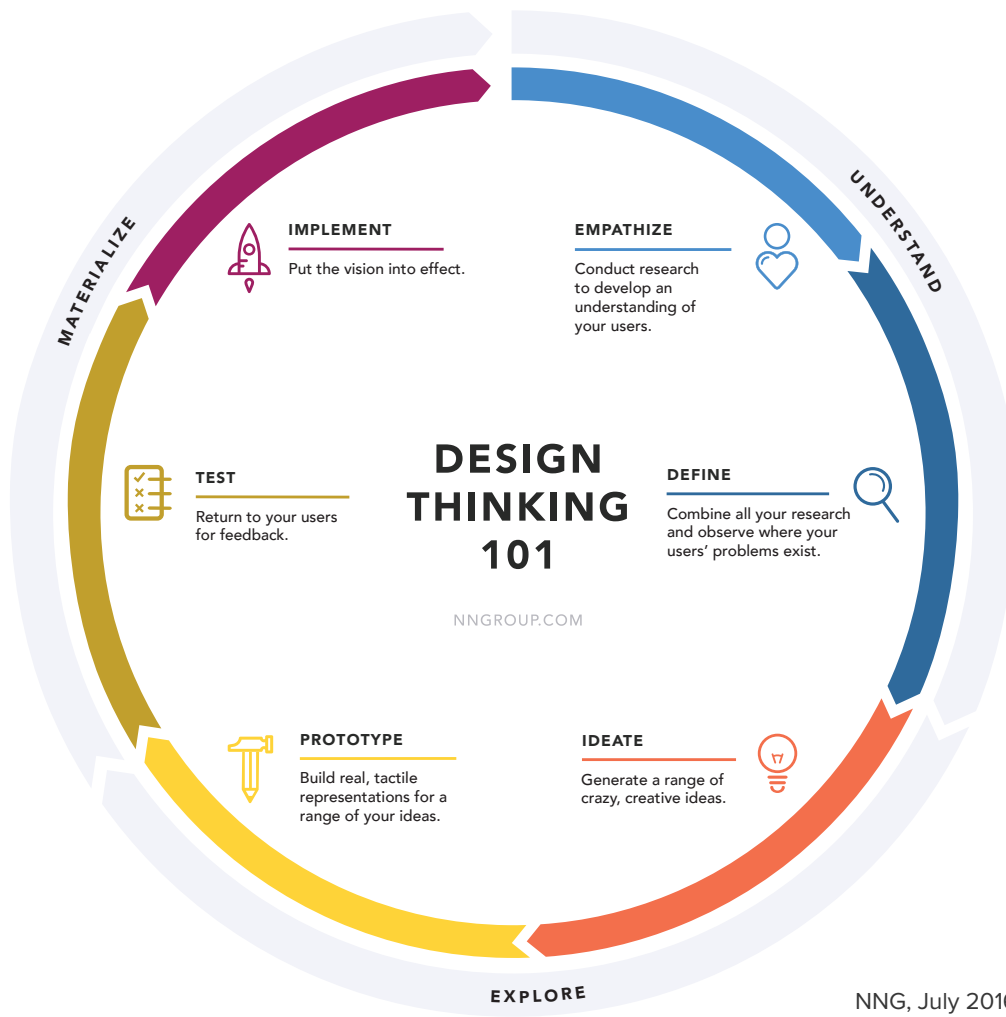
—Tim Brown, executive chair of global design and consulting firm IDEO

The Council had a lot of decisions to make as the onset of COVID posed roadblocks to several key steps entailed in earning the CDA. Many early learning programs shut down for months or were sorely

understaffed. State and local governments put new restrictions on the number of people allowed inside and often didn't let visitors enter at all, meaning that PD Specialists couldn't assess candidates by conducting CDA Verification Visits in the classrooms. The Council, in turn, couldn't award credentials, centers couldn't find newly minted CDAs to fill vacant positions and even more children couldn't get the quality early education they need.

This chain of disruptive events led the Council to talk with BCT Partners, a dynamic NJ consulting firm, about how to conduct virtual verification visits, a way to reduce wait times and simplify scheduling of the visits. The discussions with BCT also led the Council to explore the promise of design thinking to test all components of the credentialing process. The time had come to reimagine the CDA by seeking to understand stakeholders better, empathize more with their concerns, challenge accepted assumptions, and redefine problems to identify new solutions. The project to reimagine the CDA began with the following goals: ensure equity in credentialing by adopting a candidate-centric process, create a more efficient credentialing process by using all available technology and provide everyone engaged in the process with stellar customer service.





NNG, July 2016

## CDA® Stakeholders Speak

*"I like to listen. I have learned a great deal from listening carefully. Most people never listen."*

—Ernest Hemingway, author and journalist

So, the Council sought feedback from the CDA community it served. Over the course of 2021, the Council took a deep dive into its interactions with stakeholders and their reactions to the Council's key products: its website, the CDA exam, verification visit and the CDA textbook *Essentials for Working with Young Children*.<sup>9</sup> To explore these components of the CDA process, a team of Council staff members and

outside experts worked together to pinpoint strengths, pain points and windows for improvement.

The Council looked for the insights it needed by connecting with over 5,500 CDA stakeholders and two dozen early learning experts. It contacted stakeholder groups and CDAs, both current and prospective, to collect data on their experience of the Council website. It sent out online surveys to educators in different

child care settings to gain input on the tasks they routinely perform in their programs. It undertook a job analysis study for three of the Council's CDA exams—infant-toddler, preschool and family child care—to take a critical look at the Council's measures of competence, make any needed revisions and draft new blueprints for the exams.

In addition, the Council took steps to learn more about the support structure that different groups have while working toward a CDA. So, it constructed

profiles of candidates—based on factors like where candidates lived, their level of education, language, experience in teaching and race. Then it used these representative profiles to determine the likelihood of candidates earning a CDA credential and how to increase their chance of success, a way to make the early learning field more inclusive and diverse. In addition, the Council convened focus groups to determine steps in the credentialing process that tended to put up roadblocks to completion.

*“The first step in exceeding your customer’s expectations is to know those expectations.”*

—Roy H. Williams, bestselling author and marketing consultant known for his Wizard of Ads trilogy

The focus groups consisted of discussions with CDA candidates and holders, along with the PD Specialists who assess and guide them. Technology was a recurring theme in the responses. Candidates had a tough time getting answers to their questions and finding the resources that they needed. Some had internet issues or no access to the internet at all. Many had problems scheduling CDA exams at Pearson VUE testing centers, found it hard to arrange visits with a PD Specialist or couldn't even find one in the areas where they worked—all issues that just became more daunting with the advance of the pandemic.

As the world became more remote, the Council ramped up its online presence to accommodate candidates for the credential, but the Council website challenged some of its users. “There needs to be a better way to interface with the website so you can get a step-by-step idea of how you're moving toward completion of your CDA and know what to do if you stall at any stage,” one CDA candidate said. “Simplify the website for the CDA because it's not user-friendly,” another candidate pleaded. “I couldn't find the

schedules for PD Specialists to come do classroom assessments. I couldn't figure out where you take the test or how you pay for it. Finding all that out was a nightmare for me,” she moaned.

Candidates like her need extra help from PD Specialists who are adept with computers, like the one who provided this insight in a focus group with her peers. “I definitely have to walk the candidates I work with through the process and make sure they're taking the right steps while scheduling verification visits in the system.” What made it even harder, she said, is “the words on the website were small, plus the use of colors made it a little confusing.” And that posed an extra challenge for the many Spanish speakers “who had to use their phones since they couldn't afford computers” as another PD Specialist added.

And candidates who were immigrants dealt with added issues while trying to complete the credentialing process. “They have to provide a lot of documents and diplomas,” a PD Specialist said, “that they don't have on hand and find it hard to get if they went to school outside the U.S. So, the CDA application



should limit its requests to the documents that are absolutely needed,” she suggested. And one of her colleagues agreed. “The application is too long. Some of the questions don’t apply to applicants who have no experience in the early education field. And this can discourage them from going on to complete their CDA though they’ve already taken all the classes required for the credential.”

Technology also led to glitches at different stages of the CDA process, such as scheduling the verification visit. “Once you have requested a visit, you don’t get a quick answer,” one CDA candidate said. “I felt the system was a little slow, so I would have felt more relaxed if I had received a message that my request was being processed while waiting for a PD Specialist to set a specific date.” And even when there was a firm date, there could still be glitches. “Sometimes when I send candidates a proposal for a visit, they have trouble responding,” a PD Specialist explained. “So, I tell them where they need to go on the website and what buttons they need to press. Then they manage to do it. But I still feel that technology has been one of the biggest weaknesses of the process for the community we serve.”

Another complaint was the lack of adequate feedback after the classroom assessment, as one candidate pointed out. “I know the results have to be confidential,” she acknowledged, “but they could at least give us a sheet with some areas in which we need to improve,” she said. And other candidates had deep concerns before the verification visit, as a PD Specialist

had seen. “Candidates feel a lot of trepidation before we show up, though we tell them that it’s going to be okay. So, it would help to have a video that goes through the steps involved in the visit,” she explained.

“It would also be nice,” as this PD Specialist added, “for candidates to have a better idea about what’s going to happen during the exam, another trigger word that fills many of them with dread.” One candidate said she wasn’t sure what to do when she took the exam online at a Pearson VUE testing center “because the proctor didn’t give us any instructions.” And technology also posed problems when some candidates took the test. “I understand that the proctors have several tasks to deal with, but I feel they should be on hand to make sure people are comfortable with the system and don’t have any problems,” she explained. Having more Pearson VUE testing sites would also help, said a teacher who had recently taken the exam. “The site where my program sent its teachers to take the test was not accessible to all of us,” she said. “So being able to take the exam online without going to a Pearson VUE center would be very helpful to a lot of folks,” as a PD Specialist added.

Another suggestion was to let PD Specialists conduct virtual verification visits and have a virtual option for the CDA portfolio, a requirement that includes



documentation of training, resource materials for working with children and families, reflective statements of competence and a professional philosophy statement. Putting all this material online would allow PD Specialists to “verify that candidates have done all the required classes and writing before you arrive at their center for the verification visit,” as one PD Specialist said. And the idea of an online portfolio had a special appeal for a CDA candidate with a young child. “I have a one-year-old son, so I had trouble making sure he didn’t get at my papers and cover them with crayon marks once he happened to notice that I was writing on them”—not a tale of woe that came up in any other focus group. Still, it’s not a stretch to assume other rising CDAs with young kids may face the same conundrum. There are many moms among the thousands of candidates who the Council is serving around the world.

People are working to earn their CDA everywhere from the Alabama to California. And there are candidates in Pennsylvania and Puerto Rico, like one participant in a bilingual focus group. “I wanted to do a bilingual CDA,” she explained, “but I had trouble finding a bilingual PD Specialist to assess me. So, I would advise the Council to have somewhere on the website where CDA candidates can discuss this language issue and get advice from those who have resolved it. I also think that Pearson VUE should offer the exam in several languages, besides English and Spanish as now, so there are more opportunities for people who want to earn their credential. We really need a diverse group of teachers for the diverse population of children in the U.S. and beyond,” she explained, since children learn best from teachers who look like them. And that’s at the heart of equity in early learning, the social value that led to the launch of Head Start—and the CDA.



## Enhancements

- Electronic Portfolio
- Application Enhancements
- Chatbots
- Verification Visit Alternatives:
  - Simulation Verification Visits
  - Additional Forms of Evidence
- Auto-Assign PD Specialist
- Support Coach
- Exam Preparation Videos & Practice Exams
- Remote Exams
- Extended Time on Exams
- New Customer Relationship Management (CRM) system

# Input and Innovation

*“You have to do the research. If you don’t know about something, then you have to ask the right people who do.”*

—Spike Lee, filmmaker and actor whose work has explored race relations

Since the start, the CDA has changed to reflect the input of many folks from early learning experts to the rising teachers who earn the credential. That remained the case as the Council took an even deeper dive into ways to surmount the roadblocks candidates face in earning a CDA. After listening to its stakeholders’ concerns, the Council came up with a list of potential solutions and asked for their perceptions of these proposed ideas. What were the innovations that would best meet candidates’ needs as they progressed through the different steps of the CDA process? And how could the Council bring more equity to the education of our teachers?

One way, as the Council proposed, was to standardize CDA training, a suggestion that most stakeholders endorsed. There was widespread agreement that this would raise the quality of training. And that matters because teachers, like the children they serve, should get the head start everyone deserves. Participants from all focus groups acknowledged that there is a wide range of variation in the quality of training options, putting candidates who get lower-quality training at a disadvantage from the beginning. And the best way to boost the quality of training across the board is to focus on building the skills of trainers. Not only should they know their subject; they should also have the cultural competence to be attuned to candidates’ needs. In addition, they should have the proper language skills if working with non-English speaking groups of CDAs. And that’s an important qualification since the Council works with educators who speak 24 different languages in communities nationwide.

Immigrant teachers play a key role because immigrant children are the country’s fastest-growing group under age 18. Yet non-English speakers are at a particular loss when it comes to putting together their portfolios and doing all the writing that involves. So, immigrant candidates would derive special benefits from the Council’s idea for an interactive portfolio option, another idea that was met with general applause. Focus group participants thought this change would give them more room to be creative by uploading pictures and videos to showcase their skills. And pictures certainly would be worth more than a thousand words when it comes to teachers whose first language isn’t English.

Videos also played a part in some of the Council’s other ideas for helping more candidates to complete the CDA process. One well-received proposal was to make the CDA application simpler to go through and include video instructions to appeal to different learning styles and needs. Another suggestion was to help candidates prepare for the exam by providing walk-through videos of the testing site and videos on the technology used in the exam, as well as practice tests that mirror the actual exam. These were all ideas that struck a positive chord, especially among the non-English speaking CDAs. And they, like many native speakers, admitted to being anxious about the CDA exam.

Taking the exam is often the biggest roadblock to completing a CDA, so the Council proposed some ways to help candidates feel less stressed out about the test. Having more time to answer the questions would help, as the focus groups widely agreed. Simplifying



the language of the exam was another likely way to allow more candidates to get a passing score. And some candidates might also benefit from working with a support coach. The coach would help them prepare for the exam by making sure they understand the questions and scenarios in practice exams, along with the technology used in the actual exam.

In addition, the coach could help candidates solve issues that arise in locating testing sites, scheduling the exam and finding PD Specialists to observe them. For the more routine questions, having access to a 24/7 chatbot would help, as the Council proposed. And participants in all focus groups thought this would be better than having to wait on the phone for questions about the CDA process that are simple to answer. Still,

they wanted the chatbot to also serve as a way to reach a live person at the Council when needed.

Sometimes, it just helps to have someone to talk to since the credentialing process can be intense. So, many folks liked the Council's suggestion for connecting them with an advisor who could serve as a mentor and guide. Many organizations and programs have a model that includes this role, as the participants pointed out. The Council once did, too, in an earlier version of the CDA process. And the advisors were a valuable resource, according to several PD Specialists who'd served the Council for some time. Based on their remarks, the Council would encourage candidates to find mentors who can share past experiences of the CDA process and shepherd folks to the finish line.

## Equity is Essential

*"Vision without execution is a hallucination."*

—Thomas Alva Edison, inventor and businessman

We should retrieve things of value from our knowledge of the past, according to Sankofa, a concept that the Akan people of Ghana have long embraced. Sometimes you do need to look back to move ahead. And the lessons of the past are now guiding the Council as it builds the future. The Council's vision has always been an early learning system based on equity for both

children and the teachers who serve them. It's a far-reaching goal that has increasingly come to the forefront as current leadership peers through an equity lens to review Council policies, procedures and plans. The Council is now taking concrete steps to embed equity in its publications, throughout its website and in all its other content.



The Council with the support from the W.K. Kellogg Foundation has partnered with the Children's Equity Project to conduct an equity review of the CDA Competency Standards: establishing a safe, healthy learning environment; advancing physical and cognitive progress; supporting social and emotional growth; building relationships with families; ensuring a well-run, purposeful program and maintaining a commitment to professionalism. All these requirements for the early childhood profession were subject to a close look to determine whether they contained the most current equity-specific content. So was *Essentials for Working with Young Children*, the Council's premier publication, for its approach to equity in every aspect of teaching that early childhood teachers need to advance in their classroom practice and help children advance, too.

The early childhood classroom is a place where teachers can lay a solid foundation for lifelong learning, wellness and success. Yet too many young children suffer bias in the classroom that holds them back. A solid body of research shows that Black, Indigenous and Latino children are often the victims of harsh discipline

and low expectations. So, it's important to increase educators' knowledge, understanding and awareness of issues related to equity, bias and systemic racism in the classroom. Making these issues a central part of the CDA program sends a vital message to rising teachers: building equity is at the heart of the early childhood profession.

That's the Council's mantra so Council staff threw their hearts into the task of reading the CDA curriculum through an equity lens. This ambitious, time-consuming project involved reviewing all 500 pages of *Essentials* to ensure they contained the most inclusive language and up-to-date guidance to ward off bias in the classroom. The goal was to ensure that educators would embark on their work with a strong grasp of systemic racism in society at large and the way it shows up in early childhood programs. Teachers also need to know what they can do to prevent it, so the Council convened a group of experts to give teachers concrete steps they can take to ensure that all children get a fair shot at a rich, productive experience in the classroom.

## Moving the Mission Ahead

*"Disneyland will never be completed. It will continue to grow as long as there is imagination left in the world."*

—Walt Disney, founder of "the happiest place on earth"

This is the ultimate reason behind the Council's work to reimagine the CDA, based on design thinking. And it's not the first use of design thinking to benefit children. GE HealthCare used it to make having an MRI scan a less distressing experience for children, who often cried during a scan. The chief designer at GE Imaging Machines felt something had to change. So, he observed children going through the scanner while talking with

them, educators and doctors. These observations and conversations led him to conclude that children saw the scanner as a scary monster instead of a harmless piece of equipment that could help them. This insight into young patients' heads led him to make the MRI look like a pirate ship and create the CT Pirate Island Adventure, a story in which children played a starring role. And this led to dramatic results. Before the

transformation, about 80 percent of children needed to be sedated prior to a scan, and after the change this high figure dropped to a mere 10 percent. The use of design thinking had transformed an MRI scan from a terrifying ordeal to a creative journey for children.<sup>10</sup>

The Council is also going through its own creative journey as it works to reimagine its flagship credential. And it has made progress in answering some of the concerns brought up by the focus groups. The Council has a new website that offers a streamlined, user-friendly experience for visitors old and new. Revised exams in English and Spanish are now on hand, and Pearson VUE is preparing to put them into its system. A design team is working on mockups for a new dashboard that will let candidates track their steps toward completion and provide ways for PD Specialists to monitor candidates' progress. PD Specialists have also begun conducting virtual verification visits, subject to Council approval. The Council's board agreed to the purchase of an electronic portfolio and design of the English version is nearly complete, with a Spanish one to follow. Most important of all, the first months of 2023 brought the publication of a new edition of *Essentials* with a fresh stress on equity in early education.

And the Council will keep honing its efforts as it sees how well these innovations succeed.



That's part of design thinking, according to IDEO's Tim Brown, who speaks frequently to business leaders on design thinking, creative leadership and innovation. Brown believes that "design is all about learning from doing. That's how we evolve to the best solution." And it helps to have creative confidence in your design kit, according to IDEO founder David Kelley. "Creative confidence is the quality that human-centered designers rely on when it comes to making leaps, trusting their intuition and chasing solutions that they haven't totally figured out yet," he says. "Creative confidence is the notion that you have big ideas, and that you have the ability to act on them," like some great visionaries of our time.<sup>11</sup>

This strong sense of conviction helped Walt Disney surmount poverty to create an empire of entertainment that's touched the hearts and minds of millions. Disney believed that "if you can dream it, you can do it." So did Martin Luther King, Jr., a great champion of equity for all. King had a dream that "my four little children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character," as he told a crowd of over a quarter million people in 1963. And King understood that reaching our dreams sometimes requires a long, hard march ahead.

The Council has realized this, too, as we review the now, reflect on the next and revise our thinking to design the new. We'll be using the insights we've gained to transform the CDA over the next year. Then we'll continue this process since our work, too, will never be completed. Sure, there may come an end to the long child care crisis that COVID simply made worse. But new concerns will arise for the early learning field in coming years since nothing ever stays the same.

"The times they are a-changin'," as Bob Dylan sang in 1964, the year LBJ launched Head Start, leading to the birth of the CDA. Since then, the CDA has always responded to changing times and the challenges they bring. Still, the more things change, the more they stay the same. So, the Council's efforts to move ahead will also enhance its original mission: promoting equity in early education. As new issues confront our field, we



will again need to reimagine the CDA so our teachers can serve young learners even better. We'll keep listening and learning from our CDA community members, so

we can someday reach our own dream: make the early childhood classroom, like Disney's beloved theme park, the happiest place on earth for *all* young children.



## Next Steps

- New Contract with Pearson VUE Testing Centers (Summer 2023)
  - Extended exam time
  - Remote proctoring
  - Third Party proctoring
- New PDS protocols and Supports (Summer 2023)
  - Streamline candidate training verification protocol
  - Add additional field support for PDS (toll free number, device support, etc.)
- Launching Electronic Portfolio (September 2023)
  - New features for collecting additional evidence of competence (e.g., videos, pictures)
- Verification Visit Enhancements (Fall 2023)
  - Complete reliability research on V3 approach to make it permanent
  - Including new evidence collection for V3 through the electronic portfolio
- Streamline CSI
- Website Enhancements (Fall 2023)
  - Data Sharing and credential verification
  - Exam Preparation (videos, practice exams, etc.)
- New CRM with enhancements (Winter 2024)
  - Application enhancements (including streamlines renewal process)
  - Chatbots
  - Exam Preparation
  - Digital CDA credential
  - Auto-Assign PDS
  - Enhanced Data Fields
  - Dashboards for candidates and Council staff

### Additional Enhancements (2024 and Beyond)

- Web-based Simulation Verification Visits
- Support Coaches





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# Appendix



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## **COUNCIL FOR PROFESSIONAL RECOGNITION REIMAGINING THE CDA® PROCESS**

Submitted by BCT Partners  
*Updated June 23, 2022*

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**BCT PARTNERS**  
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## COUNCIL FOR PROFESSIONAL RECOGNITION

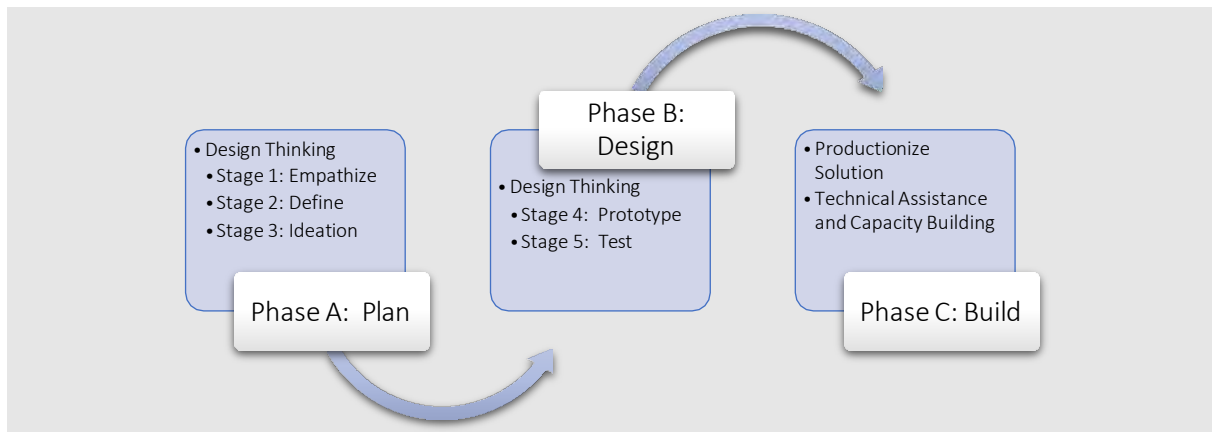
### REIMAGINING THE CDA® PROCESS REPORT

## 1. ACKNOWLEDGEMENT

This report, and the work it describes, was written and conducted collaboratively by many members of the BCT Partners staff. Abby Alfred, Lisa Kulka, and Miriam Sarwana were the primary authors of this report. We would also like to acknowledge the contributions of Peter York, Lawrence Hibbert, Nancy Schwachter, Astrid Hendricks, Saurabh Pore, and Sachin Guleria in advancing this project.

## 2. EXECUTIVE SUMMARY

BCT began this Reimagining the CDA project in April 2021. As laid out in the initial proposal, BCT took a phased approach leveraging design thinking to understand the users, challenge assumptions, and redefine problems to identify alternative strategies and solutions related to the credentialing process.



**Figure 1: Project Approach**

In February 2022, BCT concluded the first phase of this work, which included the initial empathy, define, and ideation stages of the design thinking process as seen in Figure 1. In the empathy stage, BCT developed a deep understanding of the stakeholders' experiences and needs through a series of activities including the (1) the development of logic model; (2) conducting mixed-method research; (3) facilitating focus groups and interviews with key stakeholders; (4) administering surveys; (5) reviewing of business processes. Within this stage, we used precision analytics on YourCouncil data, along with The Council's guidance, to make meaning of all the information gathered in this stage and generate a deeper understanding of the stakeholders being served.

BCT was able to segment the population of candidates into distinct profiles based on demographic, socioeconomic characteristics, and statistics related to the profiles' success with the CDA® process. With an understanding of the needs of candidates, BCT guided The Council through the ideation process to brainstorm and develop ideas to address barriers to completing the CDA® credentialing process. Specifically, The Council brainstormed suggestions to address each step of the credentialing process, resulting in



many ideas that spanned from easily attainable to difficult. While most ideas are targeted to all candidates, there are some ideas that are meant to be tailored to specific profiles to ensure each candidate receives the support necessary to be successful in earning their CDA® credential. These ideas were both refined and prioritized serving as the basis for the next phase of the project.

### **3. PROJECT BACKGROUND/PURPOSE**

The Council for Professional Recognition, a leading, nationally recognized credentialing body for early childhood educators, has served education professionals for nearly 40 years. In that time, the Council has ensured that those seeking Child Development Associate® (CDA) credentialing, regardless of their background and circumstances, would be provided the supports necessary to achieve their CDA®. The onset of the COVID-19 pandemic, however, required that the Council address challenges to multiple aspects of the process of obtaining a credential. This prompted the Council to not only seek a comprehensive solution for those challenges, but to also reimagine the systems and processes undergirding their work and stakeholder engagement. As a result, the Council established a collaboration with BCT Partners to implement a design-thinking approach in addressing the Council's needs. This design-thinking approach seeks to understand CDA® stakeholders, challenge assumptions, and redefine problems to identify alternative strategies and solutions. Initially envisioned to be utilized to improve certain aspects of the CDA® experience, BCT ultimately applied this approach to reimaging the entire credential process.

Engagement in the design process was comprised of multiple phases. First, during a three-week discovery and information gathering process, BCT developed a deeper understanding of the Council's purpose, operations, and processes to prepare a thoughtful approach to reimaging the CDA® credentialing process. BCT staff reviewed a range of documents provided by the Council and participated in a series of conversations with teams of Council staff across six different topic areas. These included History and Context, Medium, Process, Design, Space, and Technology. Within each topic, the groups discussed how the Council got to where they are in that area, as well as strengths, weaknesses, opportunities, and threats, and identified additional key resources to include in the re-imagination process. The discovery process unearthed trends and challenges the Council was experiencing, which BCT used to guide the direction of this project, and which are outlined as business challenges in the following section.

### **4. BUSINESS CHALLENGE**

To begin the design process, the Council and BCT identified the business challenges that would be necessary to solve. These served as a foundation for building the logic model, methodology, analytical processes, and interpretation of results. The three primary business challenges that BCT identified included: return to a candidate-centric, community driven process; scaling delivery and operation; and expansion to new markets.





## **4.1 RETURN TO A CANDIDATE-CENTRIC, COMMUNITY-DRIVEN PROCESS**

Prior to the Council beginning its work with BCT, the National CDA® Credentialing process was somewhat misaligned with the initial intent to have a candidate-centric, community driven process by collecting evidence across four key perspectives: (1) individual candidate; (2) parents of the children; (3) ECE advisor; and (4) the knowledge and expertise of the larger ECE community. The Council has continued to develop top-notch early childhood educators, and many changes made to systems and processes have ultimately been quite effective in terms of meeting the organization's mission. However, the consolidation of roles and focus on making the process more efficient inadvertently created new inefficiencies. Whereas the credentialing process originally included an advisor who had participated in the candidate's professional growth, as well as a representative from the broader ECE community, these distinct roles were merged into one position, the Professional Development Specialist (PDS). This consolidation seems to be at the heart of the misalignment between the Council's intentions and the actual implementation of changes relative to the process, and has raised several questions, including:

- How does the reality of the current process, versus the original intention, impact the future of this credential?
- What evidence does the Council have that its current process is meeting (or not meeting) the needs of the community?
- How did creation of the PDS role, and removal of the Advisor, in the process impact short term outcomes (e.g., attaining the credential)?
- How did creation of the PDS role, and removal of the Advisor, in the process impact long term outcomes (e.g., retention in the ECE field)?

## **4.2 SCALING DELIVERY AND OPERATIONS**

One of the challenges has been the scaling of the CDA® ecosystem to ensure the high-quality services are provided in an economical way that also fulfills its mission. At the core of the scaling challenge is the Council's interaction and coordination of applicants and management of the Professional Development Specialist workforce. The scaling challenge raises the question:

- How can processes, systems, and technologies that support the National CDA® Credentialing Program process be reimaged and aligned with its missional objectives?

## **4.3 EXPANSION TO NEW MARKETS**

There are several horizons available to be explored including growing partnerships, expanding the portfolio of credentials, and extending the reach to more diverse people and regions. There exists a tension between the opportunities and the Council's capacity, raising the question:

- How does the operational model give the Council the flexibility and nimbleness to expand into new markets?



#### 4.4 TRANSFORMATION OF THE NATIONAL CDA® CREDENTIALING PROCESS (GUIDING PRINCIPLES OF TRANSFORMATION)

The CDA® credential is highly regarded by the Early Childhood Education field as a “best first step”<sup>1</sup> into a career in early childhood education. The Power to the Profession Unifying Framework for the Early Childhood Education Profession endorses the CDA® as an industry recognized national credential for the first designation in its framework:

***Early Childhood Educator I (ECE I):*** *In birth through Grade 3 settings, an ECE I can help develop and sustain high-quality child development and learning environments and can serve as an effective member of early childhood education teaching teams. An ECE I will complete a professional preparation program that meets a minimum of 120 clock hours.*

It further describes the CDA® as “unlike” other state credentials and/or recognition because it is “stackable, available in different languages, portable across sectors, settings, higher education, or states.”<sup>2</sup>

The CDA® credential is awarded on competency-based performance. First developed in 1975, the CDA® competency-based assessment system was an innovative process designed to empower local communities to help define the quality and character of the teachers of children 5 years old and younger in their communities. The process was designed to include four perspectives, including the candidate, parents of the children, an early education advisor, and the broader ECE community. The candidate selected two of the participants in the process- the parent and the Advisor- helping shape the process as very candidate-centered.

Over time, the CDA® assessment process has evolved and been revised to reflect current issues and needs in the broader ECE field, as well as to streamline processes. In doing so, while it has remained a competency-based process, it has moved away from the candidate-centered nature.

The re-imagination of the CDA® credentialing process offers the Council an opportunity to return to the original intentions of the process to be candidate-centered and candidate driven. The transition BCT proposed for the Council recognized the necessity of maintaining the hallmark of the process to award a CDA® credential through a time-tested, research-based, portable, and industry tested competency-based process. BCT and the Council explored new ways to gather evidence to re-create a candidate-driven process, while ensuring the process remains aligned to the CDA® Competency Standards.

Table 1 below provides a high-level overview of BCT’s vision as to making effective transitions across the CDA® credentialing process:



From	To
<b>One Size Fits All</b> <ul style="list-style-type: none"> <li>All candidates, in theory, participate in the same activities to demonstrate competency, despite not every candidate being resourced the same</li> <li>As the process became standardized, there was less customization</li> <li>Exceptions are often made for expediency/efficiency, due to different circumstances, access, and resources, creating inefficiencies, and may or may not be beneficial to the intended mission and impact of the process</li> <li>While these exceptions are recognized as fitting within the process to demonstrate competency, they are not codified</li> </ul>	<b>Candidate-Centric</b> <ul style="list-style-type: none"> <li>Identify subgroups of candidates and determine what works best for whom (Precision Analytics)</li> <li>Tuning the process, support, and efforts to different subgroups, however, maintaining integrity to the CDA® Competency Standards <ul style="list-style-type: none"> <li>The evidence needs to be the same (the proof of competency), but the process for being able to generate the evidence does not have to be the same for every candidate</li> </ul> </li> <li>Objective: Ensure that the credential is validated and maintains integrity</li> </ul>
<b>Servicing the Lowest Common Denominator</b> <ul style="list-style-type: none"> <li>The current process applies a blanket approach to collecting evidence on all candidates based on what can be done with everyone</li> </ul>	<b>Portfolio Approach</b> <ul style="list-style-type: none"> <li>Establish a nuanced credentialing process based on subgroups</li> </ul>
<b>Idealized Mission</b> <ul style="list-style-type: none"> <li>Currently mission and vision are idealistic and unmeasured</li> </ul>	<b>Operational Mission</b> <ul style="list-style-type: none"> <li>Operationalized mission and vision, based on tracking, measuring and evaluating long-term outcomes of the Council's activities</li> </ul>
<b>Static Operational Model</b> <ul style="list-style-type: none"> <li>Operations [steps and timeframes of the process] are generalized for all candidates, making it difficult to be flexible when steps don't go as planned or take longer than expected. moves at a consistent pace, inflexible to react to changes</li> </ul>	<b>Operational Agility</b> <ul style="list-style-type: none"> <li>Flexibility in operations (in the level of intensity and time allotted for each step in the process), based on an ongoing assessment of the needs of different types of candidates</li> <li>Slows down, speeds up, reacts to changes and ebbs and flows in process, external context</li> </ul>
<b>Traditional Credentialing Organization</b> <ul style="list-style-type: none"> <li>Processes and activities are static</li> <li>Direction (and changes in direction) driven by leadership</li> <li>Currently, the process offers a credential based on specific, high stakes interactions (e.g. exam, verification visit)</li> <li>Data are used for tracking, monitoring and accountability, not for learning and adaptation</li> </ul>	<b>Learning Organization</b> <ul style="list-style-type: none"> <li>Understands learning and credentialing in unique and culturally relevant ways</li> <li>Provide continuous data-driven, real-time feedback on the applicant process, assessing credential completion, and feedback from employers (e.g. over time, regional, etc.)</li> <li>Understand the impact of PDS, advisors, etc. in the process</li> <li>Analytic-enabled decision making: Evaluation, assessment, progress, predictions, prescription</li> </ul>

**Table 1: Envisioned CDA® Credentialing Process Transformation Outline**

## 5. OVERVIEW OF PROCESS

Design Thinking is an iterative process harnessed to understand the user, challenge assumptions, and redefine problems to identify alternative strategies and solutions that might not be instantly apparent with one's initial level of understanding. The design thinking approach and methodology applied in this project included multiple cumulative stages, culminating in a comprehensive, mixed-methods analysis. The results of this analysis enabled the Council to commence the process of identifying and implementing



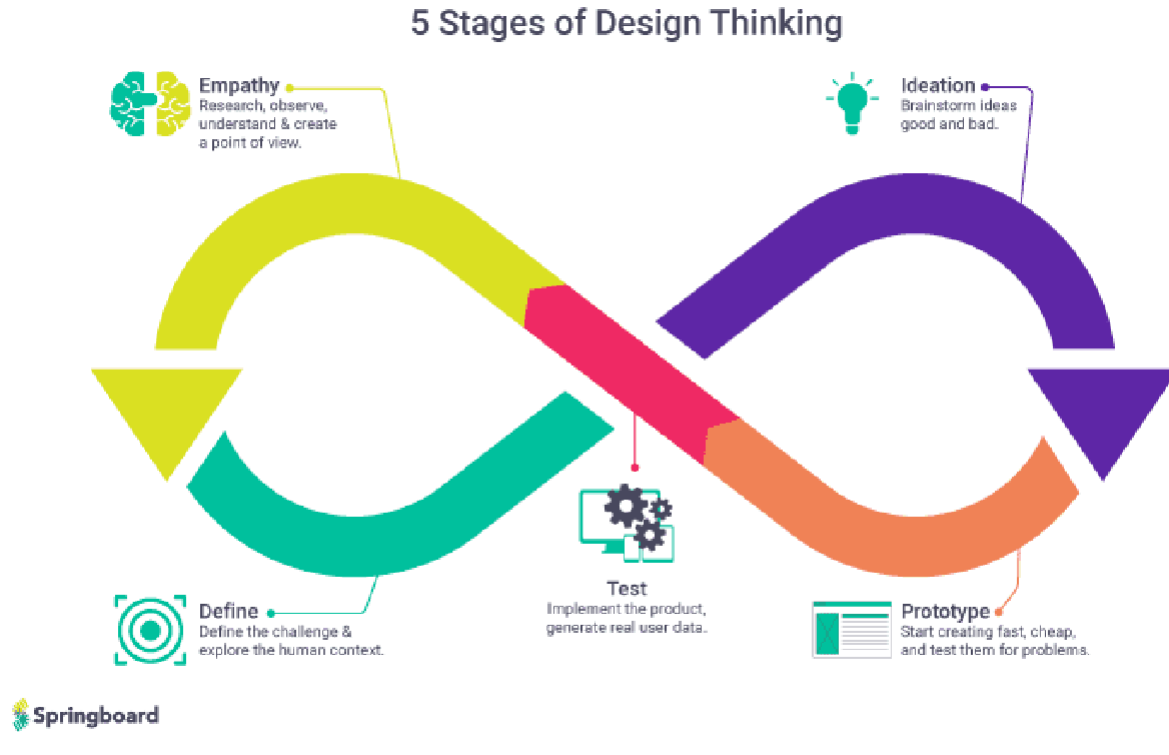


solutions to systemically reimagine the entirety of the credentialing process. While design-thinking is a solution-based approach to solving problems, it is also a mindset encompassing a wide range of practices and methods used by designers, which made for a successful approach to address the Council's specific needs. Design Thinking revolves around a deep interest in developing an understanding of the people for whom we are designing the products or services. It helps us observe and develop empathy with the target user. Design Thinking also frames the process of questioning: questioning the problem, questioning the assumptions, and questioning the implications. It is extremely useful in tackling problems that are ill-defined or unknown, by re-framing the problem in human-centric ways, creating many ideas in brainstorming sessions, and adopting a hands-on approach in prototyping and testing. Design Thinking also involves ongoing experimentation: sketching, prototyping, testing, and trying out concepts and ideas. This ensures that a final product is not only thoroughly validated, but also a result of strategic, comprehensive input from all needed stakeholders, which is reflected in the outcomes achieved in this project.

In collaboration with the Council, BCT recognized that design thinking would supply the necessary methodology to effectively tackle the process of re-imagining the CDA® credentialing process. Through this approach the Council and BCT illuminated assumptions, uncovered challenges in existing processes, and integrated new solutions into the Council's ecosystem of actors and activities. The success of the process was guided by a few key principles as defined by IDEO.org, a leader in human-centered design:

- **Creative Confidence:** The notion that you have big ideas and the ability to act on them
- **Make It:** By building something simple first, we minimize risk, make progress, and learn
- **Learn from Failure:** We seek to fail fast and move forward
- **Empathy:** Center ourselves around the people we serve; their experiences and perspectives
- **Embrace Ambiguity:** Finding comfort in exploring ideas and possibilities to seed innovation
- **Optimism:** It is the faith or knowing that the solution is out there, if we are patient
- **Iterate, Iterate, Iterate:** Iteration begets learning and learning help uncovers our solution

The Design Thinking framework follows an overall flow that traverses five stages: empathize, define, ideate, prototype, and test. These stages reflect its iterative nature and progression from divergent to convergent thinking. Figure 2 below shows both the overall framework, phases, and hallmarks of the process.

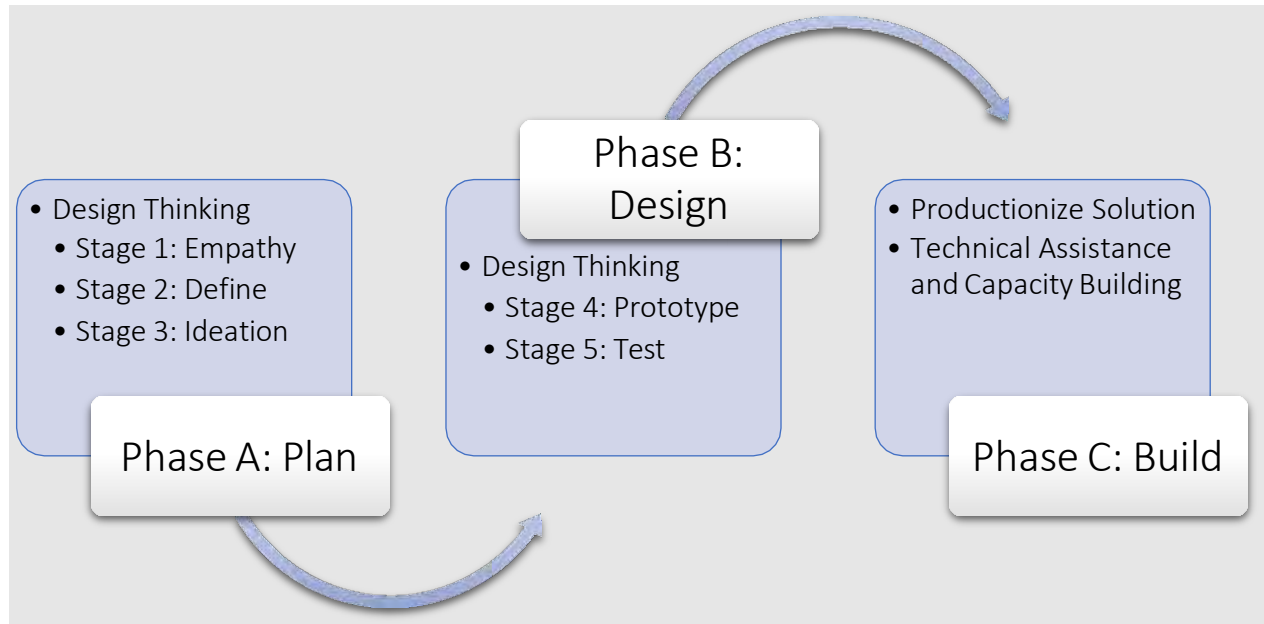


**Figure 2: Design-Thinking Process**

It is important to note that the design thinking phases are not necessarily on a single, defined linear path. Different stages might spark new ideas or showcase new Initial Findings in the user journey that will inspire new iterations of phases that had already been completed. Below is a synopsis of each phase:

- **Stage 1: Empathize** — Research Your Users' Needs.
- **Stage 2: Define** — Through Analysis of Research, State Your Users' Needs and Problems.
- **Stage 3: Ideate** — Challenge Assumptions and Create Ideas.
- **Stage 4: Prototype** — Start to Create Solutions.
- **Stage 5: Test** — Try Your Solutions Out.

Founded on the methodology of Design Thinking, BCT took a phased approach to address the Council's needs in reimagining the credentialing process. BCT employed a stepwise approach to the design challenge and organized the work across three (3) phases, the first of which (Phase A) has been achieved (see Figure 3), and the second of which (Phases B and C) will be undertaken by the Council as next steps



**Figure 3: Project Approach**

**Phase A – Plan:** In this portion of the project, BCT focused on the first half of the Design Thinking process. BCT moved through Stages 1-3, meeting needs and proactively identifying and addressing challenges before advancing to the next stage. Throughout the progression among stages, BCT successfully developed a deep understanding of the context of the Council’s needs, its problems/challenges, and generated ideas.

**Phase B – Design:** During this phase, the Council will focus on the second half of the Design Thinking process. This will be informed by the previous planning phase and will allow the Council to iterate, prototype, and test their models for viability. Stakeholders will be kept at the center of this process and confirm that a prototype will achieve the outcomes defined in the planning step.

**Phase C – Build:** Once a prototype has been chosen as a solution, the Council will work to build, productionize, and scale the solution. During this phase, The Council will require appropriate technical assistance and capacity building to successfully implement the solution.

The Council has completed Phase A in the design process, and BCT’s findings relative to their progress so far will be discussed in the remainder of this report. As both BCT and the Council elected to take a piecemeal approach based on the unknowns downstream in the design process, BCT will generate a new scope of work based on the initial findings from Phase A to advance the Council on to Phases B and C. This approach will minimize risk and facilitate the success of the overall project. Outcomes from successive phases will be reported on in the future.

To elaborate on the scope of work collaboratively achieved by the Council and BCT in Phase A, an outline of each stage in the plan is given below. This includes work completed in Stage 1, Empathize, Stage 2, Define, and Stage 3, Ideate.



## **5.1 STAGE 1: EMPATHIZE**

Empathy is the centerpiece of a human-centered design process. The Empathize phase is structured to allow for a more robust understanding of people who participate in the targeted process, within the context of the design challenge. BCT dedicated this phase to understanding the way stakeholders, in particular the applicants and beneficiaries of this program, do things and why, their physical and emotional needs, how they think about the world, and what is meaningful to them. To uncover this meaning, BCT (1) constructed a logic model; (2) conducted mixed-method research, and (3) reviewed key processes related to the CDA® National Credential.

### **5.1.1 Logic Model**

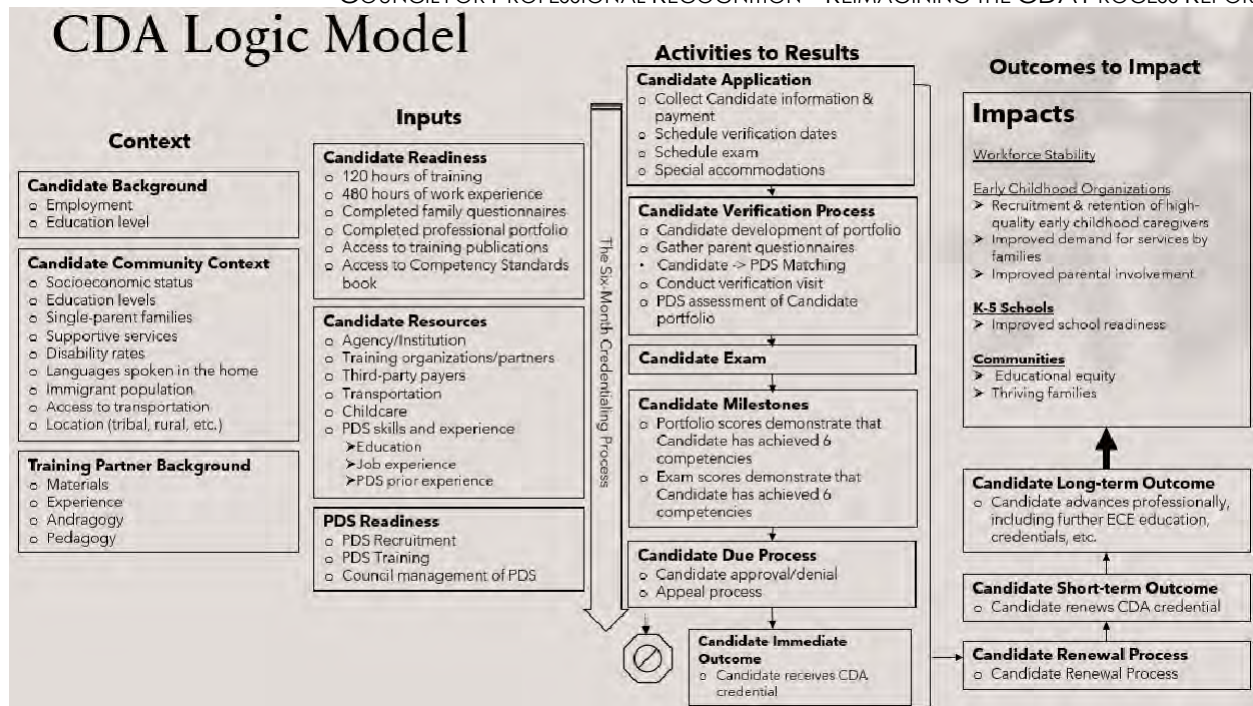
Logic models are program planning tools that define the inputs, outputs, outcomes of a program to explain the thinking behind program design and show how specific program activities lead to desired results. BCT worked with the Council to design a logic model reflective of the inputs, outputs, and outcomes of the CDA® credentialing process. Inputs included the resources, contributions, and investments that go into the CDA® credentialing process; outputs included the activities, services, events, and products that reach applicants and other stakeholders; and outcomes included the results or changes related to the CDA® credential that are experienced by the applicants and other stakeholders.

Identifying inputs, outputs, and outcomes helped BCT to answer questions such as:

- What resources are required to successfully carry out the credentialing process?
- What will the Council do to make sure the credentialing process has an impact on the identified problem?
- Who makes up the primary audience that the program is trying to engage?
- What is the ultimate goal of the credentialing process?

Figure 4 below reflects the logic model created collaboratively between BCT and the Council. This became the map for data analysis procedures, the framework for discussion as transitions were made across Phase A, and will be the tool that grounds the planning and execution of work in Phases B and C.





**Figure 4: CDA® Logic Model**

### 5.1.2 Mixed-Method Research

BCT employed a multi-disciplinary Research, Evaluation and Analytics/Learning (REAL) team to identify and validate the needs and challenges of the CDA® credentialing process. The team incorporated quantitative, qualitative, and process evaluation procedures in their approach, with data analytics components of the procedures combining descriptive, predictive, and prescriptive analytics with more advanced techniques such as machine learning and artificial intelligence (AI). Each respective piece of the overall research process is described below.

### 5.1.3 Quantitative Analysis: Precision Analytics

Precision Analytics (PA) is an analytic method that leverages subject matter experts (SMEs); existing big, transactional, and/or program administration data; and machine learning algorithms to build highly accurate, valid, and reliable assessment, evaluation, and decision-making tools. This analytic approach trains machine learning algorithms to build predictive, prescriptive, and evaluative models that determine what causes a desired outcome for each segment of a target population – individuals, groups, organizations, or communities. These algorithms are trained to conduct quasi-experimental observational studies using historical data (e.g., adult abuse, neglect, and exploitation data from historical NAMRS data). Specifically, SMEs train machine learning algorithms to find the naturally occurring experiments in history to determine what interventions have been tried by and for similar groups in the past, and which efforts produced the greatest and most significant positive results over time.

In the context of engaging in quantitative analyses of CDA® credentialing process data, BCT's REAL team collaboratively and iteratively took the steps of defining the project

framework, building an effective analytic model based on provided datasets, refining the models at multiple junctures based on feedback, and appropriately interpreting those findings both individually and in the larger context of its mixed-methods approach. The team followed five steps to the Precision Analytics approach, described in Figure 5.



**Figure 5: CDA® Predictive Analytics Approach**

1. **Discovery and Planning:** This process included consultation with SMEs (and later, the Council staff) in developing a logic model representing their assessment or evaluation framework, stating and documenting the desired impact, outcomes (results), strategies/interventions (efforts), inputs (resources), and context (target population circumstances and needs) with respect to the whole of the CDA® credentialing process. The team identified the datasets that most adequately measured the logic model elements of context, inputs, strategies, outcomes, and impact in the credentialing process, which ultimately comprised current and historical data extracts from the YourCouncil database. REAL team members then reviewed and prepared the data for PA modeling (analysis).
2. **Data Assessment and Transformation:** After preparing the data, the REAL team engaged in the process of extracting, transforming, and loading (ETL) the data into an analytics workflow. The process included communication with the Council to verify assumptions around the datasets, extracting data tables once data definitions were verified, and importing data into the KNIME workflow. KNIME is an open-source data analytics platform designed to facilitate cooperative complex statistical and machine learning enterprises. It was selected for use in this project due to its ability to statistically process multiple data sources in a streamlined manner. Once in KNIME, the team transformed the data through a combination of data cleaning, tagging, and the creation of new variables (as needed). Lastly, the team automated the Extract/Transform/Load (ETL) process and exported the final data set for precision modeling.
3. **Data Modeling:** the REAL team trained machine learning algorithms to find all the different interventions, strategies, and/or efforts made by members of the



target population (CDA® candidates) and evaluated their efficacy in relation to desired outcomes and outputs per the CDA® logic model. This process employs a ‘quasi-experimental’ method, in which random differences among these efforts serve as real-world ‘random assignment.’ Finding these variations in efforts provides an experimental lens to make comparisons between those within a similarly situated (matched) group of the population who tried an effort (the treatment group) and those who did not (the control group). This quasi-experimental approach has therefore been considered an effective and scientific way to determine which and what combination of inputs in the credentialing process caused the desired outputs/outcomes (again, per the logic model).

4. **Model Refinement:** Once the analytic model was generated, the REAL team reviewed the findings for accuracy, explicability, and applicability. We found that small refinements were necessary after discussions with key Council staff members, and the team subsequently updated and validated the final model. This iterative approach was taken collaboratively to ensure that the outcomes produced were useful, reliable, directly aligned with the logic model, and met the needs of the Council directly.
5. **Reporting:** The REAL team used the PA models and resultant findings to produce a report of findings (in the context of the overall mixed-methods approach).

Upon completion of qualitative data collection, the data was uploaded into a comprehensive database. Data was summarized using Natural Language Processing, a qualitative data analysis approach facilitated in KNIME. BCT used content analysis to organize the data into categories that translate the perspectives, experiences, and perceptions of the stakeholders into a deeper understanding of challenges and opportunities. The insights and observations from the interviews and focus groups, combined with the themes from the survey, formed the basis for BCT’s presentation of findings. BCT presented these findings to the Council, and findings were used to define the design process.

#### **5.1.4 Qualitative Analysis: Candidates, PDS, and Stakeholder Focus Groups**

Based on the themes that emerged from the quantitative research, BCT developed a robust qualitative interview protocol (applicable to both in-depth interviews (IDI) and focus groups) that probed further into topics, issues and areas that benefited from deeper insights, greater clarification, and more nuanced understanding than the quantitative research could provide. We engaged in IDIs across the various actors of the CDA® credentialing process, in particular applicants from diverse geographic settings, key stakeholders, and Professional Development Specialists.

The Council provided a list of populations from whom we should learn more about specific obstacles and challenges through the credentialing process. Additionally, BCT conducted two focus groups of partner/stakeholders to collect more information from their perspectives. Participants identified through a combination of direct outreach, based on information from the Council, as well as indicating in survey responses an interest in



participation. BCT conducted (15) focus groups of 90-min across the following stakeholder groups:

- (2) Focus Group for Bilingual (English/Spanish) candidates (4 total participants)
- (2) Focus Group for Professional Development Specialists (7 total participants)
- (1) Focus Group for Bilingual Professional Development Specialists (2 participants)
- (1) Focus Group for Applicants who received accommodations (1 participant)
- (1) Focus Groups for Applicants who requested accommodations and did not complete the Certification (1 participant)
- (1) Focus Group for Candidates in Urban/Suburban communities (6 participants)
- (1) Focus Group for Candidates in Rural Communities (2 participants)
- (1) Focus Group for Monolingual (Amharic) Candidates (8 participants)
- (1) Focus Group for Candidates who did not complete the process (7 participants)
- (1) Focus Group for Bilingual (English/Spanish) Candidates who did not complete the process (2 participants)
- (1) Focus Group for Candidates from Migrant Communities (2 participants)
- (1) Focus Group for Stakeholders from States (5 participants)
- (1) Focus Group for Stakeholders from Head Start (11 participants)

#### **5.1.5 Partner Interviews**

BCT conducted 8 interviews of 60-min across the following stakeholder categories:

- Institutions of Education (e.g., Community Colleges, High School, VoTech)
- Stakeholder Organizations (e.g., Non-Profits and Military Orgs)
- States and Associations

#### **5.1.6 Surveys**

BCT conducted surveys across the following stakeholder groups:

- Completed Candidates- Renewals (851 responses)
- Completed Candidates- No Renewals (1,426 responses)
- Professional Development Specialists (366 responses)
- Inactive Professional Development Specialists (135 responses)
- Candidates Who Did Not Complete the Process (2021 responses)
- Stakeholders (97 responses)

Upon completion of qualitative data collection, the data was uploaded into a comprehensive database. Data was summarized and processed both manually and by using Natural Language Processing, a qualitative data analysis approach facilitated in KNIME. BCT used content analysis to organize the data into categories that translate the





perspectives, experiences, and perceptions of the stakeholders into a deeper understanding of challenges and opportunities. The insights and observations from the interviews and focus groups, combined with the themes from the survey, formed the basis for BCT's presentation of findings. BCT presented these findings to the Council, and findings were used to define the design process.

### **5.1.7 Process Review**

In concert with quantitative and qualitative data collection and analysis, BCT required a deeper understanding of the logistics and structure of the processes that underlie the CDA® credentialing process as well as the ways that candidates experience them. BCT reviewed documentation, tools, and material provided by the Council that illustrated the history, function, and level of codification of processes and steps in the credentialing process. These included the exam process, the application and the application completion process, the verification visit procedures, the portfolio compilation process, the matching process, the PDS Training process, and the renewal process, among other information. Quantitative and qualitative data analyses provided key information as to what processes, and points in processes, created barriers and challenges for candidates. To ensure that the process review was comprehensive, BCT revisited and co-analyzed these documents at multiple points in this phase, as aligned with the iterative nature of our overall methodology. BCT presented findings at key points along the analysis process to ensure that meaning making was achieved in this stage.

## **5.2 STAGE 2: DEFINE**

The Define mode of the design process was structured to provide clarity and focus to the design space. BCT collaboratively defined the problem as identified in the Empathize stage, based on what was learned about CDA® users and the context of the problem. To make meaning out of the wide range of information gathered at this stage, BCT first produced an Initial Findings Report synthesizing research, observations, and interviews/focus groups, which was presented to the Council in multiple iterations based on collaborative discussions and feedback. This report summarized the defined challenges and needs that were most salient to future engagement in ideation and design activity.

Once findings were memorialized, BCT reviewed emerging trends across all analyses, and formally defined the most salient challenges experienced by each candidate demographic group. The Council and BCT iteratively co-defined and co-analyzed the relevance of these challenges across multiple discussion sessions, and ultimately identified four individual candidate groups were most conducive to further exploration relative to the Council's goals as to reimagining the CDA® credentialing process. These groups were then framed as four 'personas' that include a breakdown of the specific population of candidates identified, their strengths and challenges, and probing questions to prompt future targeted discussion as to identifying viable solutions to the challenges they face.

This has set the stage to engage the Council in Ideation processes, which is the mode of the design process in which idea generation is focused upon. Mentally, it represents a process of "going wide" in terms of concepts and outcomes. Ideation provides both the



fuel and the source material for building prototypes and getting innovative solutions into the hands of CDA® credentialing process candidates.

## 6. FINDINGS

After analyzing the data resulting from BCT's mixed-methods approach, several findings emerged that provided insight into The Council's most important strengths and areas for growth. Findings were interpreted based on the CDA® logic model, with implications of these findings observable at each stage of the logic model. BCT structured the findings into candidate profiles, demonstrating the implications of credentialing likelihood in relation to candidate identity and experiences. The findings position the Council for ideation, prototyping and implementation of sound solutions for systemic and quality improvement of services. The scope, implications, and impact of all findings are explored in detail below.

### 6.1 LOGIC MODEL FRAMEWORK

The logic model utilized in the analysis and construction of findings in this report was framed in a manner that reflected the process and results of the credentialing process. The logic model was comprised of four major sections (Figure 7): Context, Inputs, Activities to Results, and Outcomes to Impact. Each section informed various aspects of the analytic process.

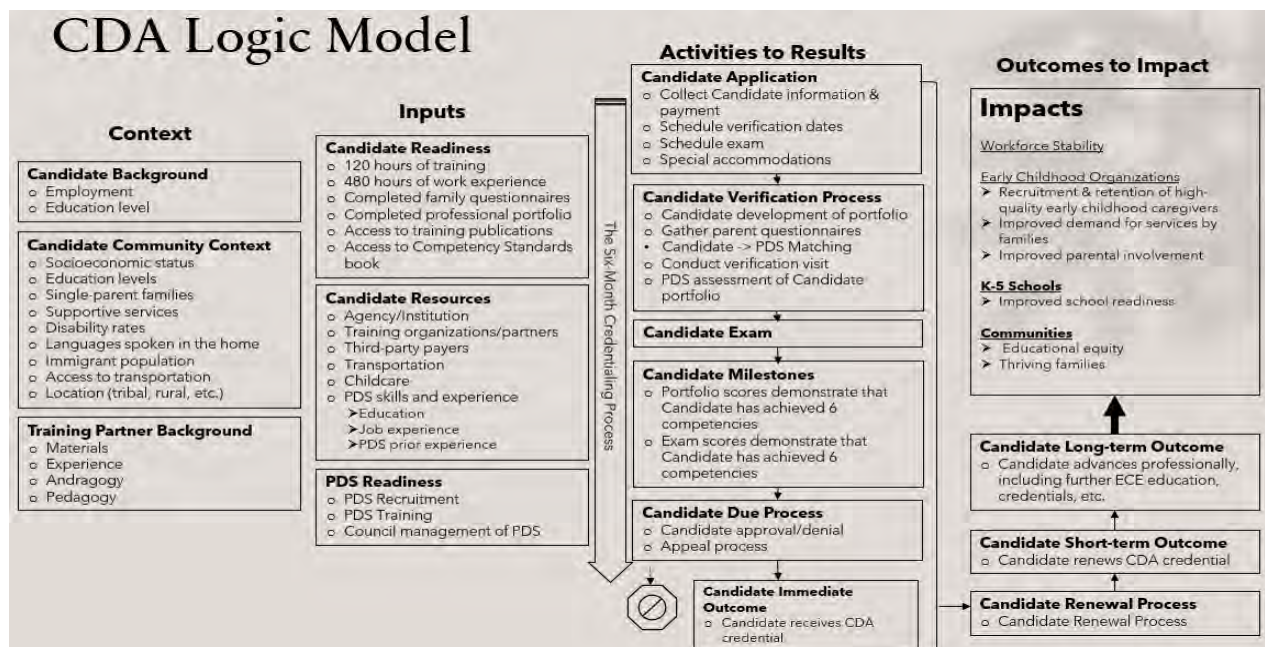


Figure 6: CDA® Logic Model



### **6.1.1 Context**

The Context section captured the factors that influenced candidates' ultimate ability to complete the credentialing process, in part or in whole. These factors included their Candidate Background (including prior and current employment, as well as highest level of education at the start of the process); Candidate Community Context (including aspects of their community and identity that were associated with their need for resources, such as disability rates, location, and primary language spoken in the home); and their training partner background, (which measured the experience level of candidates in terms of completion of training, engagement with resources and materials to support success in the credentialing process, and pedagogical/andragogical proficiency).

### **6.1.2 Inputs**

This section represented the candidate activities and resources that prepare them to navigate the credentialing process. These factors included Candidate Readiness (representing the resources that candidates would need to engage with/maximize in order to be prepared for various parts of the credentialing process, including 120 hours of required training, 480 hours of required work experience, completion of portfolio and questionnaires, and having access to training books); Candidate Resources (representing the institutions, resources, and stakeholders that facilitate candidate success in the credentialing process, such as access to transportation, a supportive training agency/institution, and childcare).

### **6.1.3 Activities to Results**

This section captured the activities and resources facilitated by the Council to put candidates through the process of credentialing, with variables representing the systems and requirements of that credentialing process. Factors that comprised this section include the candidate application process (with variables in that section representing steps in the process), the candidate verification process (with variables in that section representing steps in the process), candidate milestones (including both the required exam score and portfolio score for advancement in the process), and candidate due process (representing both the resulting credentialing decision and due process activities that candidates may engage in to appeal a decision). This section also contains an immediate outcome from completion of the credentialing process, which is the variable that represents whether or not a candidate received their CDA® credential.

### **6.1.4 Outcomes to Impact**

Finally, this section includes the range of outcomes that result from the credentialing process, as well as the expected impacts from achieving those outcomes. Outcomes were represented at two levels in relation to renewing a credential (which, again, was the



short-term outcome represented in the activities to results section): short-term (whether a candidate renews their credential) and long-term (whether a candidate engages in further professional development and advancement, such as receiving a degree). Impacts represent the projected results of candidates receiving and renewing their credentials, as well as pursuing further professional development. These include candidates achieving and maintaining professional stability in the workforce, contributing to the structural improvement of early childhood organizations, systemically enhancing readiness of pre-school students for K-5 schooling experiences, and improving educational equity and family success across all communities. This section demonstrates the expected internal (candidate-centered) and external (community-centered) results of candidate participation in the process, as well as the objectives against which candidate experiences and activities were measured in the overall project analyses.

## **6.2 READINESS FACTORS**

Findings indicate that the level of training support the candidate receives impacts the candidates' ability to succeed in the credentialing process.

### **6.2.1 Candidate Readiness Factors**

In terms of candidate training, BCT utilized precision analytics to statistically validate the rates at which candidates who received lower levels of training support obtained their credential vs. those who received higher levels of training support. Candidates who received lower levels of training support were likely to receive less one-on-one support in initially earning their CDA (by way of coaching, mentoring, and advising) and generally likely to receive less PTO in support of earning their CDA. Candidates with low levels of training support were also more likely to complete their 120 hours of training through an online training program. Candidates with low training support were more likely to receive monetary support. Candidates with high levels of training support were more likely to receive paid time off for earning their CDA.

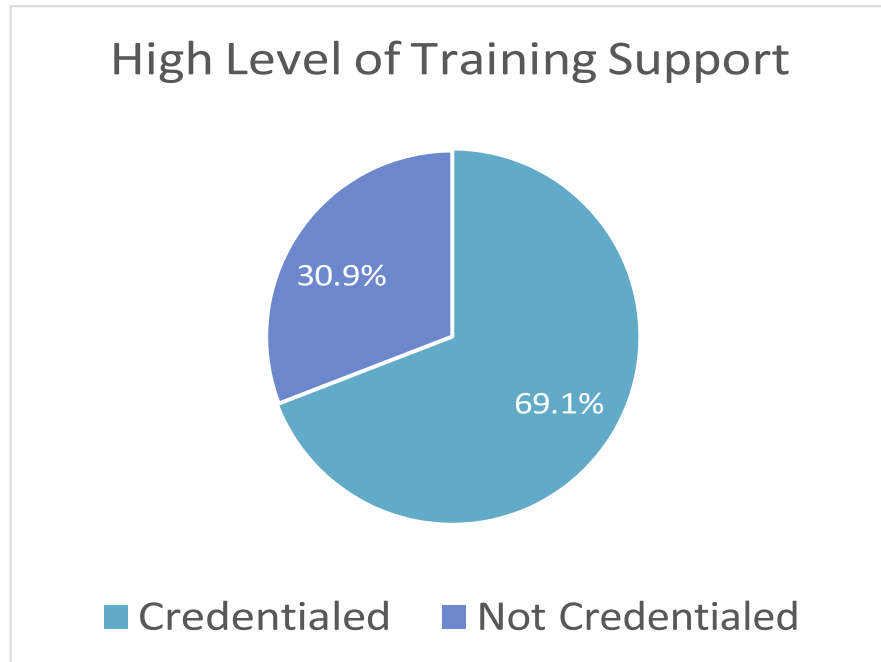




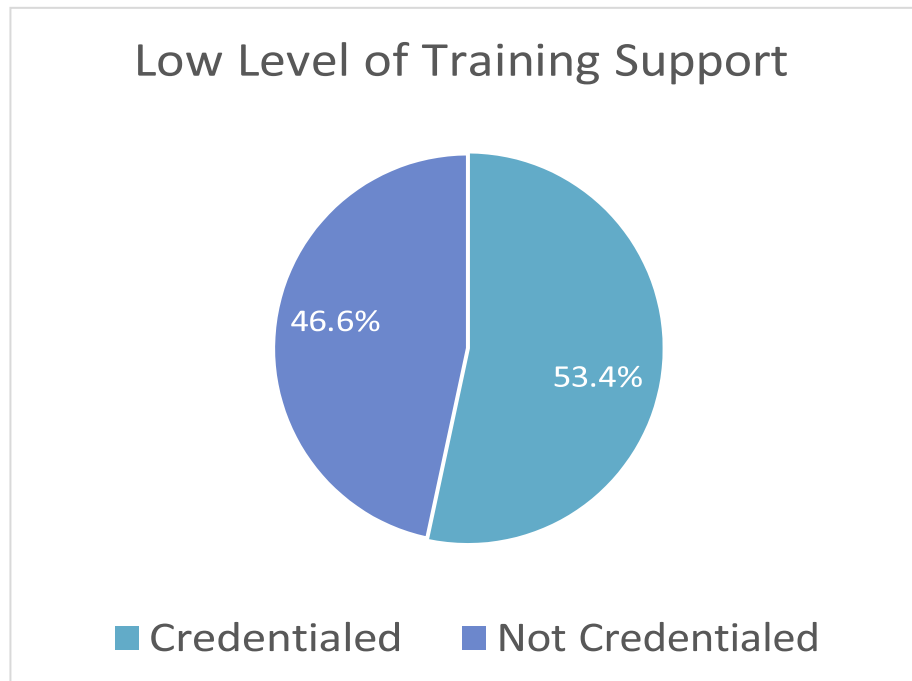
**Table 2. Types of Supports Received by Candidates with High vs. Low Training Support**

Candidates with High Training Support	Candidates with Low Training Support
More likely to receive training at a private for-profit organization in person, at a non-profit organization online training program, at early childhood centers/preschools where they were working/volunteering while initially obtaining the CDA, and in the military.	More likely to receive training in Head Start/Early Head Start program, an online training program, and at an unspecified program.
More likely to receive paid time-off from work and coaching to help earn the CDA.	More likely to receive financial support to help earn the CDA.
Most likely to receive support at their place of work and at T.E.A.C.H.	Most likely to receive support at their place of work, more likely than candidates with high training support to receive support at unspecified location.
65% of candidates with high training support were likely to receive college credits for the 120 hours of training completed to earn their CDA credentials.	56% of candidates with low training support were likely to receive college credits for the 120 hours of training completed to earn their CDA credentials
83% of candidates with high training support were likely to complete their 120 hours of training in less than a year.	85% of candidates with low training support were likely to complete their 120 hours of training in less than a year.

The results of the analysis compare credentialing rates for highly supported candidates versus candidates with lower training supports demonstrated a statistically significant difference between the candidate groups, with a 95% confidence interval. Figure 9 and Figure 10 show that 69.1% of candidates with high training support levels are credentialed as compared to 53.4% of candidates with low training support levels.



***Figure 7: Credentialing Rates of Candidates with High Training Support Levels***



**Figure 8: Credentialing Rates of Candidates with Low Training Support Levels**

A higher proportion of candidates received credentials when receiving higher levels of training support, indicating the necessity and value of receiving more training support in the readiness juncture of the process.

### **6.2.2 Application Process**

Stakeholders (including candidates, PDSs and agency/affiliated professionals) indicated that, overall, their experiences completing the application were challenging to various degrees. Many indicated that the application was easy to navigate in terms of format, however, various functional aspects were presenting barriers to completion. These included the language and instructions (with candidates indicating that both the word choices used to communicate the instructions and the language itself required improvement and expansion), and the interface (which candidates feel should be more intuitive and visually engaging). In addition, candidates found that support for the application process was slow, unhelpful, and when help was received, instructions were ambiguous or contradictory. Candidates and stakeholders desire a process that is simpler, more intuitive, inclusive of built-in supports, and that supports speakers of languages other than English.

### **6.2.3 Exam Process**

Stakeholders (including candidates, PDSs and agency/affiliated professionals) indicated that while the exam process presented opportunities for professional growth and increased legitimacy of their credentials, the exam process could be substantially improved at multiple points. Precision analytics findings from candidate survey data indicated that 6% of candidates did not believe the exam questions allowed them to



demonstrate basic appropriate early childhood practice, and 6% did not believe the exam format was clear and easy to navigate. Qualitatively, candidates found that the exam did not always provide necessary resources for success during the process (e.g., lack of provision of supports, lack of evaluation received beforehand). Candidates and stakeholders discussed that the in person and timed exam experience evokes test anxiety. Non-English speakers, in particular, experienced difficulty in the testing environment. Many candidates found that accessing the testing sites during COVID was difficult, that proctors were often unable to help with technical issues, and for both bilingual and monolingual candidates, the exam felt very long and daunting. Candidates and stakeholders desire to see increased supports at testing sites, a remote testing option, and a review by the Council of the necessity for/efficacy of timed exams.

#### **6.2.4 Verification Visit**

Stakeholders (including candidates, PDSs and agency/affiliated professionals) indicated that the verification visit process has clear professional strengths and advantages (namely in its role in professionalizing the field and practice of early childhood education, as well as allowing candidates to demonstrate their skills and build confidence). However, challenges are present at multiple junctures. Precision analytics findings from candidate survey data indicated that 11% struggle with verification visit dates, 11% of candidates thought it was difficult to identify a PDS, and 6% of candidates did not believe the reflective dialogue with a PDS helped them focus on their strengths and areas of growth. Qualitative candidate feedback aligns with these pain points. Specifically, candidates found that barriers to scheduling included limited available time slots, unresponsive PDSs, and difficulty with schedule coordination. Many also felt that the PDS matching process overall was overly long and time-consuming, and that a digital portfolio option would be a better tool to engage in reflective dialogue and facilitate professional growth. Candidates and stakeholders desire a more streamlined process, and PDSs hope for shortened paperwork, less cumbersome candidate matching, and higher compensation.

#### **6.2.5 Renewal Process**

Stakeholders (including candidates, PDSs and agency/affiliated professionals) indicated that their understanding and experience of the renewal process was uneven and varied. Most candidates agree that renewal of their CDA® credential has allowed them to stay professionally current in the field and has served as an effective mechanism for refreshing their professional knowledge and building new proficiency in current practices. They find that the increased credibility and legitimacy of their expertise is professionally beneficial. However, while some found the process easy to navigate and quick to complete, others found it time-consuming and cumbersome. Bilingual candidates, in particular, noticed the limitations of supports needed to engage in the process and have questions answered. Both monolingual and bilingual candidates indicated that they received too little communication about upcoming expiration dates and considered the process burdensome to complete every three years. Candidates desire more clear communication and increased supports to complete the process at this frequency, as well as are consideration of the required three-year timeline.





## **6.3 IMPACTS AND RECOMMENDATIONS**

Based on the findings, several recommendations emerged in alignment with the logic model. The recommendations at this stage in the process included methods by which the Council could most effectively harness their strengths and address challenges discovered throughout the credentialing process. These recommendations served as idea starters for the ideation process (detailed in the next section).

### **6.3.1 Impact Design**

In this area, BCT recommends making YourCouncil and survey data accessible and useful to system leaders, stakeholders, and researchers. This will ensure that findings and trends can be immediately processed and applied to decision-making in a meaningful way. BCT also recommends strengthening online programming, resources, and referrals for CDA® renewal, and ongoing professional development. This will allow candidates, PDSs, and other stakeholders to directly, and repeatedly, access the resources necessary to be successful.

### **6.3.2 Professional Development Specialist Design**

In this area, BCT has amassed recommendations based on the current structure of the PDS role:

- Data-driven geospatial tools should be developed to find and match PDS and candidates, which will simplify and unencumber the matching process.
- A PDS-to-PDS mentoring program should be developed, with compensation for mentors. This will serve to fortify the compensation tier system and incentivize professional improvement.

The Council might also consider restructuring the PDS role completely to account for the divergent needs both to verify competencies as well as provide support throughout the process.

### **6.3.3 Training Design**

In this area, BCT recommends monitoring, evaluating, and sharing training results with training partners, and providing programming and/or resource and referrals for candidates with low levels of training. This approach will ensure that candidates receive immediate supports based on their unique needs, and that partners and relevant stakeholders are directly engaged in that process. Creating synergy between partners and the Council may benefit candidates more strongly in the long term.

### **6.3.4 Application Design**

In this area, BCT recommends improving the application design and employing well-trained application support staff within an online/virtual screening process to minimize costs. The application re-design should target the specific pain points identified by both monolingual and bilingual candidates to meet the diverse needs of all candidates. Bringing in support staff in tandem with this re-design will ensure that fewer barriers are encountered during all points in the application process.



### **6.3.5 Verification Design**

In this area, BCT recommends designing a virtual verification visit program, developing an online PDS-to-Candidate coordination and communication tool/system, developing a real-time evaluation dashboard of PDS support, communication, and reflective dialogue, and developing a digital portfolio tool/application. This would allow for candidates and PDS's to improve their communication through lines, engage in more meaningful dialogue, make data-driven decisions, and demonstrate their knowledge and growth in a more structured manner, targeted to their individual needs.

### **6.3.6 Exam Design**

In this section, BCT recommends developing an online proctored exam option, develop a non-timed exam option to those who qualify, and revise exam accommodation guidelines to reduce barriers for non-English candidates. Given that exam barriers were most strongly experienced by bilingual candidates, these recommendations not only allow for all candidates to receive targeted support in the process, but they also foster inclusion. Many candidates found current exam structures to lack utility, and these recommendations ensure those of all backgrounds have a more equitable chance at success in the exam.

### **6.3.7 Renewal Design**

In this section, BCT recommends creating incentives for renewal (which would encourage more candidates to complete the renewal process successfully), and to develop an automated communication tool to communicate with eligible candidates. This would ensure that they clearly receive the information needed to review, and stay engaged, which has benefits beyond short- and long-term outcomes.



## **7. REIMAGINING THE CDA® CREDENTIALING PROCESS: DESIGN RESPONSE**

### **7.1 IDEATION**

The data analyses illuminated specific challenges and keys to success for CDA® candidates segmented into ten profiles. The next step of the design thinking process was to begin developing ideas to address the barriers to completion of the CDA® credentialing process for candidates based on profiles' needs and experiences.

BCT began by orienting the Council to ideation, including building an understanding of the ideation process, as well as gaining comfort working within the collaborative platform, MURAL. During the ideation stage, participants were encouraged to think widely and suspend practicality to encourage innovative thinking. The guidelines for the ideation process included:

- Defer judgement on ideas
- Encourage wild ideas
- Build upon ideas of others (e.g., think about responding to other ideas with “and” rather than “but”)
- Stay focused on the topic being discussed
- One conversation at a time
- Be visual
- Encourage high quantity of ideas

Once the Council understood the process, they worked to identify the profiles on which to prioritize in the ideation process.

### **7.2 JOURNEY MAPPING PROCESS**

Once the Council selected the profiles on which to focus the ideation process, BCT and the Council worked collaboratively to develop journey maps for each profile within MURAL, a digital workspace for collaboration. A journey map (see Figure 26) is a visual representation of the process one navigates to accomplish a goal; in the context of this project, it is the process a candidate navigates to earn the CDA® credential. The intention of using journey maps to guide the ideation phase was to help address the specific needs and pain points within each step of the process, before then connecting across the full credentialing process to develop a systematized solution.

For each of the four selected profiles, the Council and BCT mapped out the process through four key stages: Application, Verification Visit, Exam, and Renewal. Within each stage, the Council and BCT listed, based on knowledge of the process and the data analysis:



**Actions:** activities a candidate does

**Needs:** resources and capacities a candidate requires to complete a state

**Feelings:** a candidate's emotional response to the actions required to complete the stage

**Pain Points:** negative experiences or friction getting in the way of taking the actions required to complete the stage.

In addition to journey mapping the four selected profiles of candidates, BCT and the Council also mapped the process of Professional Development Specialists.

### **7.3 IDEA GENERATION PROCESS**

Once the Council agreed that the journey maps looked complete, BCT began to guide them through the ideation phase over a series of meetings, focusing on one profile at a time. For each profile, smaller breakout groups focused on one stage within the process, and later reported out to the full group.

The ideation process focused on the stages in the process with identified needs and more negative feelings, as noted on the journey maps. Due, in part, to limitations with the data on the renewal process, there were not needs specific to the renewal process identified for any profile, so the Council did not ideate for renewal as part of this process. Instead, BCT and the Council found it valuable to focus on the other parts of the process to get candidates initially credentialed, and later revisit whether there should be changes to the renewal process.

To guide the ideation conversations within each stage, participants answered a series of “how might we” questions corresponding to the needs and pain points of candidates in that profile. For example, for profiles with needs related to ease of scheduling an exam, participants were prompted with the question “How might we address challenges scheduling an exam?” Additionally, the recommendations BCT had provided to the Council with the data analysis were placed on the MURAL board for the Council to reference and include with their ideas as appropriate and desired.

Groups were given a few minutes to quietly put ideas on sticky notes within MURAL, before engaging in discussion about and elaborating on the ideas. BCT facilitators helped clarify, draw connections between, and invite participants to build upon others’ ideas. Ideation sessions within the small groups typically last about 25 minutes, with groups then reporting to the full group on the ideas they generated.

This process was repeated for Professional Development Specialists. By the end of the idea generating process, the Council had generated dozens of ideas across the stages of the credentialing process.

### **7.4 REFINEMENT AND PRIORITIZATION OF IDEAS**

With the completion of idea generation, the next step was to refine and prioritize all the Council's ideas. BCT reviewed all the ideas across the four profiles and began to create categories within each phase of the process in a new MURAL board. Each category was labeled with a description phrase to make meaning of the ideas, and the ideas were color





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coded within each category to correspond with the profile they belong to.

Over two meetings with the Council, BCT led the process of refining and prioritizing the ideas. For each stage, Council participants were instructed to vote on the idea category(/ies) they most wanted to focus on. The top ideas became the foundations of “super ideas”, and Council staff then identified other idea categories that aligned and helped build upon and strengthen the ideas. With the visual representation of the four different profiles represented by color, the Council considered how widely applicable the ideas would be to the various profiles and included ideas that would benefit the most candidates.

Through facilitated discussion, the Council ultimately generated several ideas across the credentialing process that can result in a systematized reform of the credentialing process. While most ideas are targeted at all candidates, there are some ideas that are meant to be tailored to specific profiles, to ensure each candidate receives the support necessary to be successful in their efforts to earn the CDA® credential.

**Table 3. Priority Ideas Resulting from Completed Ideation Process**

Training	Portfolio	Application	Verification Visit	Exam	Communication
<ul style="list-style-type: none"> <li>Create standards for training that include requiring specific resources to be used by trainers</li> </ul>	<ul style="list-style-type: none"> <li>Change the format to be electronic and interactive, including inputs from more people</li> <li>Expand the purpose to incorporate the reflective aspect of the credentialing process by creating a space to think deeply about own practice</li> <li>Work with advisor during this phase</li> </ul>	<ul style="list-style-type: none"> <li>Require all applicants to watch a video- built into the application- describing the full credentialing process</li> <li>Simplify the language and instructions throughout the application</li> <li>Use graphic/visual representation to show people where they are in the process</li> <li>Apply analytics within application system to identify and track progress based on profiles</li> <li>Match candidates in particular profiles- or those who opt in- to a success coach</li> </ul>	<ul style="list-style-type: none"> <li>Expand virtual verification visit               <ul style="list-style-type: none"> <li>Simulation</li> <li>Additional ways to provide evidence of competencies (e.g., videos, diary entries)</li> </ul> </li> <li>Match candidates in particular profiles- or those who opt in- to a success coach</li> <li>Streamlined PDS role</li> </ul>	<ul style="list-style-type: none"> <li>Remote exam options</li> <li>Extended exam time</li> <li>Exam language and instructions to be simplified</li> <li>Preparation for the exam to include practice tests mirroring the actual exam to identify gaps/challenges as well as preparation for the exam experience (e.g., video walk through of testing site; video walk through of remote process)</li> <li>Match candidates in particular profiles- or those who opt in- to a success coach</li> </ul>	<ul style="list-style-type: none"> <li>Chatbots (using AI to answer commonly asked questions)</li> <li>Social networks/ connections</li> <li>Improved dashboards of information about CDA®s/locations accessible to CDA®s and other ECE partners</li> <li>Tool (e.g., app) for communication between candidate and PDS, coach, etc.</li> </ul>

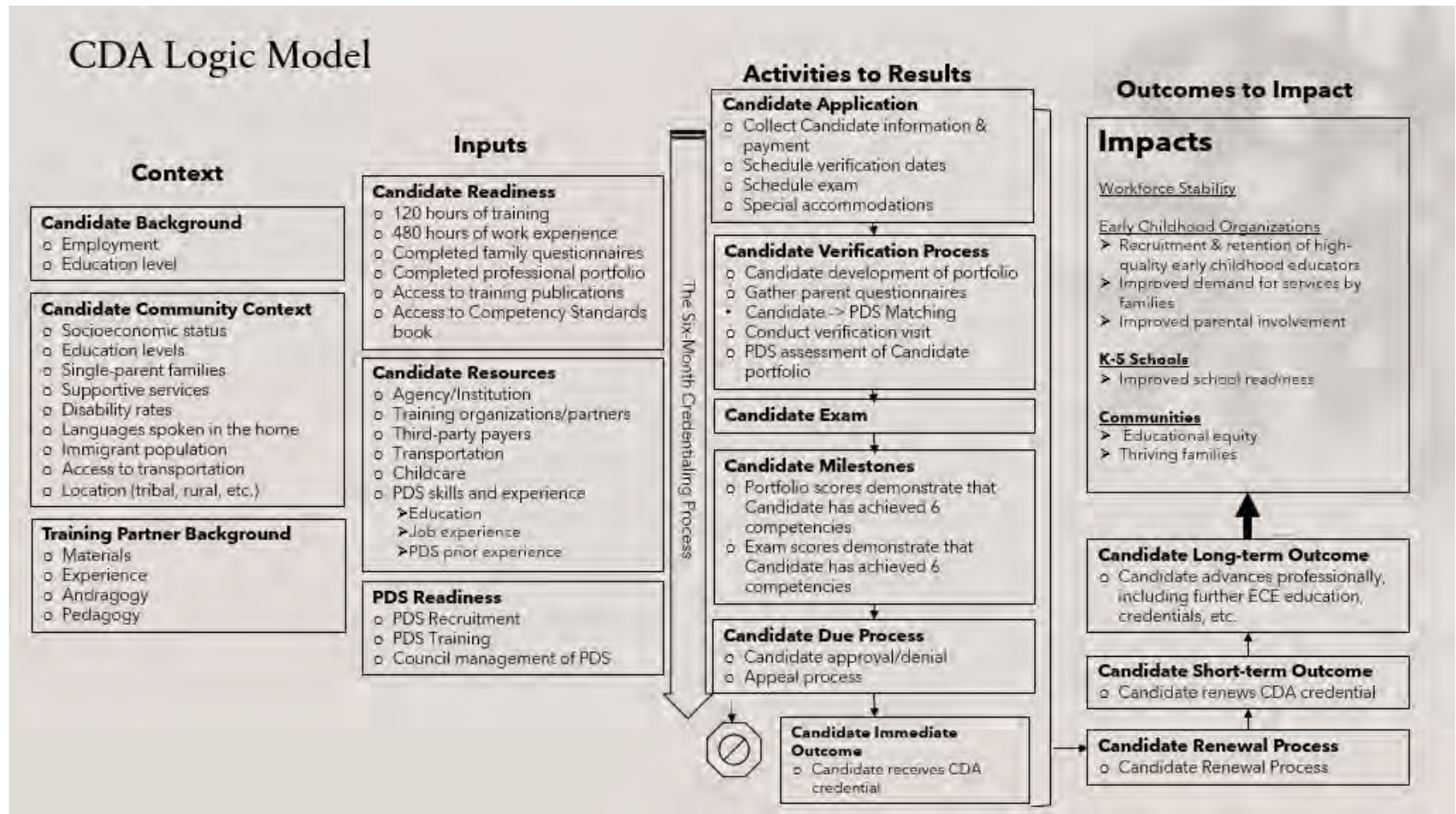
## **8. NEXT STEPS**

With the completion of the first phase, the project will next move into prototyping and testing the ideas. BCT will lead the Council through a process of continuing to refine the ideas from the ideation phase into business requirements that will impact people, process, and technology. With the business requirements developed, next will come the development of technology requirements to lay out the full ecosystem of what is being done. BCT will use this information to develop a mockup of the pilot system and develop an implementation plan for the changes to the CDA® credentialing process.



## 9. APPENDIX

### 9.1 LOGIC MODEL





## 9.2 SURVEY OF CANDIDATES OF COMPLETED THE CREDENTIALING PROCESS

Welcome to the Council for Professional Recognition's Reimagining the Child Development Associate® (CDA) Credential Process Survey! Completing the assessment should take you no more than 10-15 minutes.

Your response is voluntary, confidential, and will be used to enhance the agency's understanding of the experiences and perspectives of CDA® candidates. In order to protect confidentiality, no one at the Council for Professional Recognition will see your individual responses. BCT Partners will only provide aggregate reporting for demographic groups and work units with ten or more respondents. Your voluntary ratings and input are extremely important to this process.

Thank you in advance for participating in the Council for Professional Recognition's Reimagining the CDA Credential® Process Survey.

### 1. Did you earn the CDA® credential?

☐ Yes

☐ No

### 2. Q2 In which country did you apply for your initial CDA® credential?

☐ China

☐ Egypt

☐ Panama

☐ United Arab Emirates

☐ United States

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*Display This Question:*

*If In which country did you apply for your initial CDA® credential? = United States*



**3. In which state or territory did you apply for your initial CDA® credential?**

▼ Alabama (161) ... Wyoming (215)

*Display This Question:*

*If Did you earn the CDA® credential? = Yes*

**4. Q8 The first few questions are about your experience with the Child Development Associate® (CDA) credential.**

	Not Applicable	Not at All	Somewhat	Mostly	Completely
Helps me to stay up-to-date in the early education field. (5)					
Made me feel like I am part of a profession. (6)					
Helps early childhood educators like me get a raise. (7)					
Helps early childhood educators like me have a career path. (9)					
Helped me get a job. (10)					
Helped me keep my job. (11)					
Encouraged me to pursue higher education such as getting an associate's or bachelor's degree. (12)					

**5. Are you a member of an early childhood association?**

☐ Yes

☐ No

*Display This Question:*

*If Are you a member of an early childhood association? = Yes*

**6. Do you find membership in an association beneficial to your career?**

☐ Yes

☐ Somewhat

☐ No



**7. Would you recommend the CDA® to others?**

- ☐ Yes
- ☐ Maybe
- ☐ No

*Display This Question:*

*If Did you earn the CDA® credential? = Yes*

**8. Have you used your CDA® in more than one state to obtain employment?**

▼ 1975 (1) ... 2021 (47)

**9. What was the main reason you initially applied for your CDA®? Please choose ONE answer.**

- ☐ I was interested in working with young children
- ☐ My employer required it
- ☐ It helped me get a job
- ☐ It helped me keep my job
- ☐ It helped me get a better job
- ☐ It helped me work toward a higher degree, such as an Associate's or a Bachelor's degree
- ☐ It helped me get a raise
- ☐ It helped me get promoted
- ☐ Other (specify)

*Display This Question:*

*If Did you earn the CDA® credential? = Yes*

**10. Have you renewed your credential?**

- ☐ Yes



☐ Yes, more than once

☐ No

*Display This Question:*

*If Have you renewed your credential? = Yes, once*

*Or Have you renewed your credential? = Yes, more than once*

**11. What was the main reason you renewed your CDA®?**

- ☐ I was interested in working with young children
- ☐ My employer required it
- ☐ It helped me get a job
- ☐ It helped me keep my job
- ☐ It helped me get a better job
- ☐ It helped me work toward a higher degree, such as an Associate's or a Bachelor's degree
- ☐ It helped me get a raise
- ☐ It helped me get promoted
- ☐ Other (specify)

*Display This Question:*

*If Did you earn the CDA® credential? = Yes*

**12. For each type of credential below, tell us if you ever had it, if you had it at one time and it has now expired, or you never had it?**

	Never Had	Hold currently	Used to have but is expiring
Center-based infant/toddler			
Center-based pre-school			
Family child care			
Home visitor			





*Display This Question:*

*If For each type of credential below, tell us if you ever had it, if you had it at one time and it h... = Used to have but is expired*

*Or For each type of credential below, tell us if you ever had it, if you had it at one time and it h... = Used to have but is expired*

*Or For each type of credential below, tell us if you ever had it, if you had it at one time and it h... = Used to have but is expired*

*Or For each type of credential below, tell us if you ever had it, if you had it at one time and it h... = Used to have but is expired*

**13. If your CDA® credential expired, what is the main reason for that? Please choose ONE answer. If multiple credentials expired, please respond for the one that has expired most recently.**

- ☐ I have not had time to meet the renewal requirements
- ☐ I have not had the financial resources to meet the renewal requirements
- ☐ I have not had time to submit the paperwork
- ☐ I forgot to renew
- ☐ I have an AA or higher degree in early childhood education or related field
- ☐ I no longer work in the early childhood education or child care field
- ☐ I have a new position and it is no longer required
- ☐ Other (specify)

*Display This Question:*

*If For each type of credential below, tell us if you ever had it, if you had it at one time and it h... = Used to have but is expired*

**14. If your credential expired during the Covid-19 pandemic, did factors related to the pandemic impact your ability to complete the renewal process?**

- ☐ Yes
- ☐ No

**15. In which language did you complete the CDA® exam?**



- ☐ English
- ☐ Spanish
- ☐ Other language (which language?)

**16. In which language did you prepare the portfolio?**

- ☐ English
- ☐ Spanish
- ☐ Other language (which language?)

**17. In which language did you complete the verification visit with your Professional Development Specialist™?**

- ☐ English
- ☐ Spanish
- ☐ Other language (which language?)

**The next few questions are about the training that you completed to earn your initial CDA® credential.**

**18. Now think of the 120 hours of training you completed when you first earned your CDA® credential. Please tell us where you obtained that training. Check all that apply.**

- ☐ At a community organization
- ☐ At a private for-profit organization- in person
- ☐ For-profit organization online training program
- ☐ Non-profit organization online training program
- ☐ At a community college



- ☐ At a vocational or technical school
- ☐ At a 4-year college or university
- ☐ Military
- ☐ In high school
- ☐ In Head Start/Early Head Start
- ☐ At early childhood center/pre-school where I now work
- ☐ At early childhood center/pre-school where I was working/volunteering when I was initially obtaining the CDA
- ☐ Other (specify)

**19. How long did it take you to complete the required 120 hours of training to earn your initial CDA® credential?**

- ☐ Less than 6 months
- ☐ 6 to 9 months
- ☐ 10 to 12 months
- ☐ 1 to less than 2 years
- ☐ 2 or more years

**20. Did you receive college credits for any of the 120 hours of training you completed to earn your initial CDA® credential?**

- ☐ Yes, degree track credits
- ☐ Yes, continuing education credits
- ☐ No

**The next few questions are about any support you may have received in order to earn your initial CDA® credential.**



**21. Did you receive any of the following types of support to help you initially earn your CDA®? If you received multiple forms of support, select up to 3 that had the most impact in your effort to earn your credential.**

- ☐ Help paying tuition or fees for training
- ☐ Help paying travel expenses
- ☐ Paid time-off from work
- ☐ Help paying for books and other course related materials
- ☐ Training course offered at no charge at my place of work
- ☐ Coaching, mentoring, or advising
- ☐ Help with paying for CDA credential fees and materials
- ☐ Other (specify)
- ☐ None of the above

*Skip To: Q27 If Did you receive any of the following types of support to help you initially earn your CDA®? If yo... = None of the above*

**22. From whom did you receive support? Check all that apply.**

- ☐ Community organization
- ☐ State agency
- ☐ My place of work
- ☐ T.E.A.C.H.
- ☐ Other (specify)

*Display This Question:*

*If Have you renewed your credential? = Yes, once*

*And Have you renewed your credential? = Yes, more than once*

**The next few questions are about the training that you completed to renew your CDA® credential.**





*Display This Question:*

*If Have you renewed your credential? = Yes, once*

*And Have you renewed your credential? = Yes, more than once*

**23. Now think of all the training you obtained when you renewed your CDA®. Please tell us where you obtained that training. Check all that apply.**

- ☐ At a community organization
- ☐ At a private for-profit organization
- ☐ At a community college
- ☐ At a vocational or technical school
- ☐ At a 4-year college or university
- ☐ Online training program
- ☐ Military
- ☐ In high school
- ☐ In Head Start/Early Head Start
- ☐ At Child Care Center/Pre-school where I now work
- ☐ At Child Care Center/Pre-school where I was working/volunteering when I was renewing the CDA
- ☐ Other (specify)

*Display This Question:*

*If Have you renewed your credential? = Yes, once*

*And Have you renewed your credential? = Yes, more than once*

**24. Did you receive any of the following types of support to help you renew your CDA®? If you received multiple types of support, select up to 3 that had the most impact in your effort to renew your credential.**

- ☐ Help paying tuition or fees for training



- ☐ Help paying travel expenses
- ☐ Paid time-off from work
- ☐ Help paying for books and other course related materials
- ☐ Training course offered at no charge at my place of work
- ☐ Coaching or mentoring
- ☐ Help paying for CDA credential fees and materials
- ☐ Other (specify)
- ☐ None of the above

*Skip To: Q31 If Did you receive any of the following types of support to help you renew your CDA®? If you receive... = None of the above*

*Display This Question:*

*If Have you renewed your credential? = Yes, once*

*And Have you renewed your credential? = Yes, more than once*

**25. From whom did you receive support? Check all that apply.**

- ☐ Community organization
- ☐ State agency
- ☐ My place of work
- ☐ T.E.A.C.H.
- ☐ Other (specify)

**26. Please rate the following statements about the CDA-related training.**



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	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
It was easy to find the training to complete the required 120 hours to earn the CDA					
It was easy to find the training to meet the renewal requirements of the CDA					
I was satisfied with the training options available to me when I was initially working toward earning the CDA					
I was satisfied with the training options available to me when I was working toward renewing the CDA					
The training prepared me to work with young children					

**Work Experience While Earning CDA® Initially:** The next few questions are about the work experience you obtained while studying to earn your initial CDA credential.

**27. Now, think of the 480 hours of work experience you obtained in order to be eligible to apply to get your initial CDA®. How did you obtain the required 480 hours of work experience? Check all that apply.**

- ☐ Volunteered at an early childhood center/pre-school program where I am currently employed
- ☐ Volunteered at an early childhood center/pre-school program where I used to be employed
- ☐ Volunteered at another early childhood center/pre-school program
- ☐ Through employment at an early childhood center/pre-school program where I currently work
- ☐ Through employment at an early childhood center/pre-school program where I used to be employed
- ☐ Through employment at another early childhood center/pre-school program
- ☐ Other (specify)

**28. Were you employed during the time when you were preparing for your initial CDA®?**

- ☐ Yes



☐ No

*Skip To: Q39 If Were you employed during the time when you were preparing for your initial CDA®? = No*

**29. Were you employed in a setting working with children birth to 5 years, including as a home visitor, when you were studying to earn your CDA®?**

- ☐ Yes, worked with infant/toddlers
- ☐ Yes, worked with pre-school age children
- ☐ Yes, worked with both infant/toddlers and pre-school age children
- ☐ Yes, worked as a home visitor
- ☐ No, was not employed working with children birth to 5 years

*Skip To: Q39 If Were you employed in a setting working with children birth to 5 years, including as a home visito... = No, was not employed working with children birth to 5 years*

**30. Please think of the job you held working with children birth to 5 years while studying for your CDA®. What was your title at that job? Check one.**

- ☐ Center director
- ☐ Assistant center director
- ☐ Family child care provider
- ☐ Lead teacher
- ☐ Assistant teacher
- ☐ Teacher's aide
- ☐ Education supervisor/coordinator
- ☐ Home visitor
- ☐ Other (specify)





**31. At the time when you were studying to earn your CDA®, in which setting did you primarily work with children birth to 5 years? Check one.**

- ☐ Early childhood center (not accredited)
- ☐ Early childhood center (accredited)
- ☐ Family child care home (not accredited)
- ☐ Family child care home (accredited)
- ☐ Pre-school
- ☐ Home visiting program
- ☐ Head Start
- ☐ Early Head Start
- ☐ Public school
- ☐ Private school
- ☐ Military program
- ☐ Other (specify)

**32. Was the place where you worked when you were studying to earn your CDA® any of the following? Check all that apply.**

- ☐ Military program
- ☐ Migrant program
- ☐ Local, state or another program funded by the federal government
- ☐ Nonprofit organization
- ☐ None of the above

**Education: The next questions we have are about the formal education you have completed.**

**33. What year did you graduate from high school or obtain your GED?**

▼ 1937 (1) ... 2021 (85)

**34. Please select all that apply**

- ☐ I have taken college-level classes either in a community college, a 4-year college or university
- ☐ I have taken college-level classes that count toward obtaining my initial CDA credential or to renew it
- ☐ I have an Associate's degree
- ☐ I am currently working toward an Associate's degree
- ☐ I plan to enroll in an Associate's degree program in the next 12 months
- ☐ I have a Bachelor's degree
- ☐ I am currently working toward a Bachelor's degree
- ☐ I have a Master's degree
- ☐ I am currently working toward a Master's degree
- ☐ I have a PhD, EdD, or similar doctorate degree
- ☐ I am currently working toward a PhD, EdD, or similar doctorate degree
- ☐ I hold a certificate or credential, other than the CDA® in early childhood education or child care (not including First Aid or CPR certification)
- ☐ I have not taken any classes or training beyond the CDA

**Current Employment**

**35. Are you currently employed?**

- ☐ Yes, full-time
- ☐ Yes, part-time



- ☐ Yes, have multiple jobs
- ☐ No, not currently employed

*Skip To: Q46 If Are you currently employed? = No, not currently employed*

**36. Are you currently employed in working with children birth to 5 years, including working as a home visitor or an administrator in an early childhood program?**

- ☐ Yes, full-time
- ☐ Yes, part-time
- ☐ Yes, have multiple jobs
- ☐ No, not currently employed

*Skip To: Q46 If Are you currently employed in working with children birth to 5 years, including working as a home... = No, not currently working with young children*

**Display This Question:**

*If Are you currently employed in working with children birth to 5 years, including working as a home... = Yes, full-time*

*Or Are you currently employed in working with children birth to 5 years, including working as a home... = Yes, part-time*

*Or Are you currently employed in working with children birth to 5 years, including working as a home... = Yes, both full- and part-time (have multiple jobs)*

**37. If working with children birth to 5 years, in what type of setting do you work?**

- ☐ Center with infant/toddlers
- ☐ Center with pre-school age children
- ☐ Center with both infant/toddlers and pre-school age children
- ☐ Family childcare
- ☐ Home visitor

**Now, we have some questions regarding the credential process**



**38. How did you complete the CDA® application when you first applied for the credential?**

- ☐ Online
- ☐ Paper application

**39. Please rate the following statements about the application process.**

	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
It was easy to complete the application					
It was easy to schedule the exam					
It was easy to identify an exam site					
The format of the exam was clear and easy to navigate					
Exam preparation materials effectively prepared me to do my best on the exam					
The exam questions allowed me to demonstrate my knowledge of basic appropriate early childhood practice					
It was easy to identify a Professional Development Specialist™					
It was easy to schedule a verification visit					
To the best of my knowledge, the CDA Professional Development Specialist™ followed the standardized procedures to schedule the verification visit					
To the best of my knowledge, the CDA Professional Development Specialist™ followed all the standardized procedures throughout the verification visit					
The verification visit allowed for a fair assessment of my competencies in early childhood education					
The portfolio assessment allowed me to demonstrate my competencies					
The reflective dialogue with the Professional Development					



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	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Specialist™ helped me focus on my strengths and areas of growth					
The overall credential assessment included perspectives of people who could speak fairly to my competencies in early childhood education					
The overall credential assessment process allowed me to fully understand and address areas for my professional growth					
The overall credential process set me up for success and/or provided me with opportunities for support if I needed them in order to be successful					
I have felt supported by the Council for Professional Recognition to complete the credential process requirements					

**40. Did you request accommodations for a disability?**

☐ Yes

☐ No

*Display This Question:*

*If Did you request accommodations for a disability? = Yes*

**41. Were your accommodations met for the exam?**

☐ Yes

☐ Somewhat

☐ No

*Display This Question:*

*If Did you request accommodations for a disability? = Yes*

**42. Was the accommodation request process easy?**





- ☐ Very easy
- ☐ Somewhat easy
- ☐ Somewhat difficult
- ☐ Very difficult
- ☐ My request for accommodation was denied

*Display This Question:*

*If Did you request accommodations for a disability? = Yes*

**43. Did you receive approval for your accommodation quickly?**

- ☐ Very quickly
- ☐ Somewhat quickly
- ☐ Somewhat slowly
- ☐ Very slowly
- ☐ My request for accommodation was denied

**44. After completing the CDA® credential process, did you receive a denial decision?**

- ☐ Yes
- ☐ No

*Display This Question:*

*If After completing the CDA® credential process, did you receive a denial decision? = Yes*

**45. Did you appeal the decision by the Council to deny your credential after the verification visit and exam were complete?**

- ☐ Yes- I was denied the credential and I appealed the decision
- ☐ No- I was denied the credential and did not appeal the decision



*Display This Question:*

*If Did you appeal the decision by the Council to deny your credential after the verification visit a... = Yes- I was denied the credential and I appealed the decision*

*And For which parts of the credential process did you request an accommodation? = Exam*

**46. Were your accommodations met for the re-do exam?**

- ☐ Yes
- ☐ Somewhat
- ☐ No

*Display This Question:*

*If Did you appeal the decision by the Council to deny your credential after the verification visit a... = Yes- I was denied the credential and I appealed the decision*

**47. Did the appeals process result in a change of the decision (granting the credential)?**

- ☐ Yes
- ☐ No

**48. What was the most significant barrier you encountered when trying to earn your CDA® credential? Select up to three.**

- ☐ Family obligations
- ☐ Lacked child care for my own family
- ☐ Insufficient employer support
- ☐ Academic struggles
- ☐ CDA® application process in YourCouncil/technical issues
- ☐ Challenges scheduling exam (e.g. finding exam location)
- ☐ Challenges scheduling verification visit (e.g. matching with CDA Professional Development Specialist™)



- ☐ Unable to find consistent transportation
- ☐ Lack of financial resources to meet the application requirements
- ☐ Accommodations (e.g. for disability) were not met
- ☐ Insufficient time to meet the requirements
- ☐ Insufficient time to submit the paperwork
- ☐ Covid or health related challenges
- ☐ I did not experience significant barriers when trying to obtain my CDA®
- ☐ Other (specify)

## Technology

### 49. Do you own any of the following? Check all that apply

- ☐ Laptop
- ☐ Desktop
- ☐ Smartphone
- ☐ Tablet
- ☐ Other means of accessing the Internet (specify)

### 50. For each of the following devices, please indicate your comfort level.

	Cannot use technology	Can use but in a limited manner	Can use in a basic manner	Can use with good proficiency	Can use with advanced proficiency
Work computer (desktop or laptop)					
Home computer (desktop or laptop)					
Tablet device					
Another type of device (please specify)					



**51. For each of the following activities, please indicate your comfort level using technology.**

	Cannot use technology	Can use but in a limited manner	Can use in a basic manner	Can use with good proficiency	Can use with advanced proficiency
Reading the news					
Completing training or a course					
Completing an application					
Attending meetings					
Facilitating/Leading meetings					
Teaching students					

**Demographics: We are almost done! The last few questions are about you. Note, this information will only be used to categorize the data that you provide and will not be used to identify you in any way. All information provided will be kept confidential.**

**52. Are you of Hispanic, Latino or Spanish origin?**

☐ Yes

☐ No

**53. What is your race? Check all that apply.**

☐ White

☐ Black or African-American

☐ American Indian or Alaska Native

☐ Asian

☐ Native Hawaiian or other Pacific Islander

☐ Other (specify)

☐ Prefer not to say

**54. What is your age? (Years)**

☐

**55. What is your gender?**

- ☐ Male
- ☐ Female
- ☐ Non-binary / third gender
- ☐ Prefer not to say
- ☐ Other

**56. What is your marital status?**

- ☐ Married
- ☐ Living with partner
- ☐ Divorced or separated
- ☐ Widowed
- ☐ Never married/Single

**57. Do you have any children of your own?**

- ☐ Yes, under age six years
- ☐ Yes, but older than six years
- ☐ Yes, both younger and older than six years
- ☐ No, do not have children

*Display This Question:*

*If Do you have any children of your own? = Yes, under age six years*

*Or Do you have any children of your own? = Yes, both younger and older than six years*

**58. Do you have adequate child care?**





☐ Yes

☐ No

**59. What are the languages you speak at home? Check all that apply.**

☐ Amharic

☐ Arabic

☐ English

☐ French

☐ Russian

☐ Spanish

☐ Other (specify)

**60. What was your household income before taxes in calendar year 2020? Please include the earnings of all working members of your household and any earnings that you have from assets such as rental or farm income, unemployment, or other benefits**

☐ Less than \$10,000

☐ \$10,001 to \$20,000

☐ \$20,001 to \$34,999

☐ \$35,000 to \$49,999

☐ \$50,000 to \$74,999

☐ \$75,000 to \$99,999

☐ \$100,000 or more

☐ Don't know

**61. In what country do you live?**

- ☐ China
- ☐ Egypt
- ☐ Panama
- ☐ United Arab Emirates
- ☐ United States
- ☐ Other (specify)

*Display This Question:*

*If In what country do you live? = United States*

**62. What state do you live in?**

\_\_\_\_\_

**63. What county do you live in?**

\_\_\_\_\_

*Display This Question:*

*If In what country do you live? = United States*

**64. What is your zip code?**

\_\_\_\_\_

**65. What is your first name? (Optional)**

\_\_\_\_\_

**66. What is your last name? (Optional)**

\_\_\_\_\_

**Thank you for completing this survey. We may look to gather more information from survey respondents. If you would be willing to speak with us further about your responses and experiences with the CDA® credential process, please include your email address. We will contact you if there is more information we need from you.**



### **9.3 SURVEY OF CANDIDATES WHO DID NOT COMPLETE THE CREDENTIALING PROCESS**

Welcome to the Council for Professional Recognition's Reimagining the Child Development Associate® (CDA) Credential Process Survey! Completing the assessment should take you no more than 10-15 minutes.

Your response is voluntary, confidential, and will be used to enhance the agency's understanding of the experiences and perspectives of CDA® candidates. In order to protect confidentiality, no one at the Council for Professional Recognition will see your individual responses. BCT Partners will only provide aggregate reporting for demographic groups and work units with ten or more respondents. Your voluntary ratings and input are extremely important to this process.

Thank you in advance for participating in the Council for Professional Recognition's Reimagining the CDA Credential® Process Survey.

#### **1. In which country did you begin the CDA® credential process?**

- ☐ China
- ☐ Egypt
- ☐ Panama
- ☐ United Arab Emirates
- ☐ United States
- ☐ Other (specify)

*Display This Question:*

*If In which country did you begin the CDA® credential process? = United States*

#### **2. In which state did you begin the CDA® credential process?**

▼ Alabama (51) ... Wyoming (105)

#### **3. In which year did begin the CDA® credential process?**

▼ 1975 (1) ... 2021 (47)



**4. What was the main reason you considered or wanted to apply for your CDA®? Please choose ONE answer.**

- ☐ I was interested in working with young children
- ☐ My employer required it
- ☐ It helped me get a job
- ☐ It helped me keep my job
- ☐ It helped me get a better job
- ☐ It helped me work toward a higher degree, such as an Associate's or a Bachelor's degree
- ☐ It helped me get a raise
- ☐ It helped me get promoted
- ☐ Other (specify)

**5. Which parts of the CDA® credential process DID you complete? Select all that apply.**

- ☐ 120 clock hours of professional early childhood education, including 10 hours in each of the eight CDA subject areas
- ☐ 480 hours of work experience working with children in the age group matching CDA application
- ☐ Portfolio development
- ☐ Application
- ☐ Scheduled exam
- ☐ Completed exam
- ☐ Scheduled verification visit
- ☐ Completed verification visit



**6. Indicate the reasons you did not complete the CDA® credential process (select all that apply).**

- ☐ No longer work in early childhood education field
- ☐ Family obligations
- ☐ Lacked child care for my own family
- ☐ Insufficient employer support
- ☐ Academic struggles
- ☐ CDA application process in YourCouncil/technical issues
- ☐ Challenges scheduling exam (e.g. finding exam location)
- ☐ Challenges scheduling verification visit (e.g. matching with CDA Professional Development Specialist™)
- ☐ Unable to find transportation
- ☐ Lack of financial resources to meet the application requirements
- ☐ Accommodations (e.g. for disability, language) were not met
- ☐ Insufficient time to meet the requirements
- ☐ Insufficient time to submit the paperwork
- ☐ Pursued an AA or higher degree in the early childhood education or child care field
- ☐ My position doesn't require it
- ☐ Covid or health related challenges
- ☐ Other (specify) \_\_\_\_\_

**7. Do you intend to complete the CDA® credential process in the future?**





☐ Yes

☐ No

**8. In which language did you or would you complete the CDA® exam?**

☐ English

☐ Spanish

☐ Other language (which language?) \_\_\_\_\_

**9. In which language did you or would you prepare the portfolio?**

☐ English

☐ Spanish

☐ Other language (which language?) \_\_\_\_\_

**10. In which language did you or would you complete the verification visit with your CDA Professional Development Specialist™?**

☐ English

☐ Spanish

☐ English/Spanish (bilingual)

☐ Other language (which language?) \_\_\_\_\_

**Display This Question:**

*If Which parts of the CDA® credential process DID you complete? Select all that apply. = 120 clock hours of professional early childhood education, including 10 hours in each of the eight CDA subject areas*

**The next few questions are about the training that you completed to earn your initial CDA® credential.**



*Display This Question:*

*If Which parts of the CDA® credential process DID you complete? Select all that apply. = 120 clock hours of professional early childhood education, including 10 hours in each of the eight CDA subject areas*

**11. Now think of the 120 hours of training you completed to apply for the CDA® credential. Please tell us where you obtained that training. Check all that apply.**

- ☐ At a community organization
- ☐ At a private for-profit organization
- ☐ At a community college
- ☐ At a vocational or technical school
- ☐ At a 4-year college or university
- ☐ Online training program
- ☐ Military
- ☐ In high school
- ☐ In Head Start/Early Head Start
- ☐ At early childhood center/pre-school where I now work
- ☐ At early childhood center/pre-school where I was working/volunteering when I was initially obtaining the CDA®
- ☐ Other (specify) \_\_\_\_\_

*Display This Question:*

*If Which parts of the CDA® credential process DID you complete? Select all that apply. = 120 clock hours of professional early childhood education, including 10 hours in each of the eight CDA subject areas*

**12. How long did it take you to complete the required 120 hours of training to apply for the CDA® credential?**

- ☐ Less than 6 months
- ☐ 6 to 9 months



- ☐ 10 to 12 months
- ☐ 1 to less than 2 years
- ☐ 2 or more years

*Display This Question:*

*If Which parts of the CDA® credential process DID you complete? Select all that apply. = 120 clock hours of professional early childhood education, including 10 hours in each of the eight CDA subject areas*

**13. Did you receive college credits for any of the 120 hours of training you completed to earn your initial CDA® credential?**

- ☐ Yes, degree track credits
- ☐ Yes, continuing education credits
- ☐ No

*Display This Question:*

*If Which parts of the CDA® credential process DID you complete? Select all that apply. = 480 hours of work experience working with children in the age group matching CDA application*

**14. Now, think of the 480 hours of work experience you obtained in order to be eligible to apply to get your initial CDA®. How did you obtain the required 480 hours of work experience? Check all that apply.**

- ☐ Volunteered at an early childhood center/pre-school program where I am currently employed
- ☐ Volunteered at an early childhood center/pre-school program where I used to be employed
- ☐ Volunteered at another early childhood center/pre-school program
- ☐ Through employment at an early childhood center/pre-school program where I am currently employed
- ☐ Through employment at an early childhood center/pre-school program where I used to be employed
- ☐ Through employment at another early childhood center/pre-school program
- ☐ Other (specify) \_\_\_\_\_

**The next few questions are about any support you may have received in order to try to earn your initial CDA® credential.**

**15. Did you receive any of the following types of support to help you initially earn your CDA®? If you received multiple types of support, select up to 3 that were most valuable to you.**

- ☐ Help paying tuition or fees for training
- ☐ Help paying travel expenses
- ☐ Paid time-off from work
- ☐ Help paying for books and other course related materials
- ☐ Training course offered at no charge at my place of work
- ☐ Coaching or mentoring
- ☐ Help with paying for CDA® credential fees and materials
- ☐ Other (specify) \_\_\_\_\_
- ☐ None of the above

*Skip To: Q79 If Did you receive any of the following types of support to help you initially earn your CDA®? If yo... = None of the above*

**16. From whom did you receive support? Check all that apply.**

- ☐ Community organization
- ☐ State agency
- ☐ My place of work
- ☐ T.E.A.C.H.
- ☐ Other (specify) \_\_\_\_\_

*Display This Question:*

*If Did you receive any of the following types of support to help you initially earn your CDA®? If yo... = None of the above*



**17. If you did not receive any of the listed types of support, do you believe you would have completed the CDA® credential process IF YOU HAD received any of the following types of support? Select up to three.**

- ☐ Help paying tuition or fees for training
- ☐ Help paying travel expenses
- ☐ Paid time-off from work
- ☐ Help paying for books and other course related materials
- ☐ Training course offered at no charge at my place of work
- ☐ Coaching or mentoring
- ☐ Help with paying for CDA® credential fees and materials
- ☐ Other (specify) \_\_\_\_\_
- ☐ None of the above

**The next questions we have are about the formal education you have completed.**

**18. What year did you graduate from high school or obtain your GED?**

▼ 1937 (1) ... 2021 (85)

**19. Please select all that apply**

- ☐ I have taken college-level classes either in a community college, a 4-year college or university
- ☐ I have taken college-level classes that count toward earning my initial CDA® credential or to renew it
- ☐ I have an Associate's degree
- ☐ I am currently working toward an Associate's degree
- ☐ I plan to enroll in an Associate's degree program in the next 12 months
- ☐ I have a Bachelor's degree





- ☐ I am currently working toward a Bachelor's degree
- ☐ I have a Master's degree
- ☐ I am currently working toward a Master's degree
- ☐ I have a PhD, EdD, or similar doctorate degree
- ☐ I am currently working toward a PhD, EdD, or similar doctorate degree
- ☐ I hold a certificate or credential, other than the CDA® in early childhood education or child care (not including First Aid or CPR certification)
- ☐ I have not taken any classes or training beyond the CDA®

**20. Are you currently employed?**

- ☐ Yes, full-time
- ☐ Yes, part-time
- ☐ Yes, have multiple jobs
- ☐ No, not currently employed

**21. Are you currently employed in working with children birth to 5 years, including working as a home visitor or an administrator in an early childhood program?**

- ☐ Yes, full-time
- ☐ Yes, part-time
- ☐ Yes, both full and part-time (have multiple jobs)
- ☐ No, not currently employed

*Skip To: Q46 If Are you currently employed in working with children birth to 5 years, including working as a home...  
= No, not currently working with young children*



*Display This Question:*

*If Are you currently employed in working with children birth to 5 years, including working as a home... = Yes, full-time*

*Or Are you currently employed in working with children birth to 5 years, including working as a home... = Yes, part-time*

*Or Are you currently employed in working with children birth to 5 years, including working as a home... = Yes, both full- and part-time (have multiple jobs)*

**22. If working with children birth to 5 years, in what type of setting do you work?**

- ☐ Center with infant/toddlers
- ☐ Center with pre-school age children
- ☐ Center with both infant/toddlers and pre-school age children
- ☐ Family childcare
- ☐ Home visitor

**Now, we have some questions regarding the credential process**

**23. How did you complete the CDA® application when you first applied for the credential?**

- ☐ Online
- ☐ Paper application

**24. Please rate the following statements about the application process.**

	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
It was easy to complete the application					
It was easy to schedule the exam					
It was easy to identify an exam site					
The format of the exam was clear and easy to navigate					
Exam preparation materials effectively prepared me to do my best on the exam					
The exam questions allowed me to demonstrate my knowledge					



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	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
of basic appropriate early childhood practice					
It was easy to identify a Professional Development Specialist™					
It was easy to schedule a verification visit					
To the best of my knowledge, the CDA Professional Development Specialist™ followed the standardized procedures to schedule the verification visit					
To the best of my knowledge, the CDA Professional Development Specialist™ followed all the standardized procedures throughout the verification visit					
The verification visit allowed for a fair assessment of my competencies in early childhood education					
The portfolio assessment allowed me to demonstrate my competencies					
The reflective dialogue with the Professional Development Specialist™ helped me focus on my strengths and areas of growth					
The overall credential assessment included perspectives of people who could speak fairly to my competencies in early childhood education					
The overall credential assessment process allowed me to fully understand and address areas for my professional growth					
The overall credential process set me up for success and/or provided me with opportunities for support if I needed them in order to be successful					
I have felt supported by the Council for Professional Recognition to complete the credential process requirements					



**25. Did you request accommodations for a disability?**

☐ Yes

☐ No

*Display This Question:*

*If Did you request accommodations for a disability? = Yes*

**26. Were your accommodations met for the exam?**

☐ Yes

☐ Somewhat

☐ No

*Display This Question:*

*If Did you request accommodations for a disability? = Yes*

**Technology**

**27. Do you own any of the following? Check all that apply**

☐ Laptop

☐ Desktop

☐ Smartphone

☐ Tablet

☐ Other means of accessing the Internet (specify)

**28. For each of the following devices, please indicate your comfort level.**

	Cannot use technology	Can use but in a limited manner	Can use in a basic manner	Can use with good proficiency	Can use with advanced proficiency
Work computer (desktop or laptop)					
Home computer (desktop or laptop)					



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	Cannot use technology	Can use but in a limited manner	Can use in a basic manner	Can use with good proficiency	Can use with advanced proficiency
Tablet device					
Another type of device (please specify)					

**29. For each of the following activities, please indicate your comfort level using technology.**

	Cannot use technology	Can use but in a limited manner	Can use in a basic manner	Can use with good proficiency	Can use with advanced proficiency
Reading the news					
Completing training or a course					
Completing an application					
Attending meetings					
Facilitating/Leading meetings					
Teaching students					

**Demographics: We are almost done! The last few questions are about you. Note, this information will only be used to categorize the data that you provide and will not be used to identify you in any way. All information provided will be kept confidential.**

**30. Are you of Hispanic, Latino or Spanish origin?**

☐ Yes

☐ No

**31. What is your race? Check all that apply.**

☐ White

☐ Black or African American

☐ American Indian or Alaska Native

☐ Asian

☐ Native Hawaiian or other Pacific Islander

☐ Other (specify) \_\_\_\_\_



☐ Prefer not to say

**32. What is your age? (Years)**

☐ \_\_\_\_\_

**33. What is your gender?**

- ☐ Male
- ☐ Female
- ☐ Non-binary / third gender
- ☐ Prefer not to say
- ☐ Other

**34. What is your marital status?**

- ☐ Married
- ☐ Living with partner
- ☐ Divorced or separated
- ☐ Widowed
- ☐ Never married/Single

**35. Do you have any children of your own?**

- ☐ Yes, under age six years
- ☐ Yes, but older than six years
- ☐ Yes, both younger and older than six years



- ☐ No, do not have children

*Display This Question:*

*If Do you have any children of your own? = Yes, under age six years*

*Or Do you have any children of your own? = Yes, both younger and older than six years*

**36. Do you have adequate child care?**

- ☐ Yes

- ☐ No

**37. What are the languages you speak at home? Check all that apply.**

- ☐ Amharic

- ☐ Arabic

- ☐ English

- ☐ French

- ☐ Russian

- ☐ Spanish

- ☐ Other (specify) \_\_\_\_\_

**38. What was your household income before taxes in calendar year 2020? Please include the earnings of all working members of your household and any earnings that you have from assets such as rental or farm income, unemployment, or other benefits**

- ☐ Less than \$10,000

- ☐ \$10,001 to \$20,000

- ☐ \$20,001 to \$34,999

- ☐ \$35,000 to \$49,999



- ☐ \$50,000 to \$74,999
- ☐ \$75,000 to \$99,999
- ☐ \$100,000 or more
- ☐ Don't know

**39. In what country do you live?**

- ☐ China
- ☐ Egypt
- ☐ Panama
- ☐ United Arab Emirates
- ☐ United States
- ☐ Other (specify)

*Display This Question:*

*If In what country do you live? = United States*

**40. What state do you live in?**

\_\_\_\_\_

**41. What county do you live in?**

\_\_\_\_\_

*Display This Question:*

*If In what country do you live? = United States*

**42. What is your zip code?**

\_\_\_\_\_

**43. What is your first name? (Optional)**

---

**44. What is your last name? (Optional)**

---

Thank you for completing this survey. We may look to gather more information from survey respondents. If you would be willing to speak with us further about your responses and experiences with the CDA® credential process, please include your email address. We will contact you if there is more information we need from you.

## **9.4 SURVEY OF PROFESSIONAL DEVELOPMENT SPECIALISTS**

Welcome to the Council for Professional Recognition's Reimagining the Child Development Associate® (CDA) Credential Process Survey!

Completing the assessment should take you no more than 10-15 minutes.

Your response is voluntary, confidential, and will be used to enhance the agency's understanding of the experiences and perspectives of Professional Development Specialists™. In order to protect confidentiality, no one at the Council for Professional Recognition will see your individual responses. BCT Partners will only provide aggregate reporting for demographic groups and work units with ten or more respondents. Your voluntary ratings and input are extremely important to this process.

Thank you in advance for participating in the Council for Professional Recognition's Reimagining the CDA® Credential Process Survey.

**1. In which country are you a Professional Development Specialist™?**

- ☐ China
- ☐ Egypt
- ☐ Panama
- ☐ United Arab Emirates
- ☐ United States



*Display This Question:*

*If In which country are you a Professional Development Specialist™? = United States*

**2. In which state are you a Professional Development Specialist™?**

▼ Alabama (51) ... Wyoming (105)

*Display This Question:*

*If In which country are you a Professional Development Specialist™? = United States*

**3. Do you serve as a Professional Development Specialist™ in more than one state?**

☐ Yes

☐ No

*Display This Question:*

*If Do you serve as a Professional Development Specialist™ in more than one state? = Yes*

**4. If you serve as a Professional Development Specialist™ in more than one state, what other state(s) do you go to?**

**5. In what year did you become a Professional Development Specialist™? (If don't remember the exact year, your best estimate will suffice)**

**6. Check off all the endorsements for which you have been approved.**

☐ Center-based infant/toddler

☐ Center-based pre-school

☐ Family child care

☐ Home visitor

**7. In the past two years, approximately how many Verification Visits have you conducted:**

☐ 1-25





- ☐ 25-50
- ☐ 50-100
- ☐ Over 100

**8. Do you have a CDA® credential?**

- ☐ Yes
- ☐ No, my credential has expired
- ☐ No, I have never had the CDA credential

*Display This Question:*

*If Do you have a CDA® credential? = Yes*

*And Do you have a CDA® credential? = No, my credential has expired*

**9. In what year did you initially obtain your CDA® credential?**

▼ 1975 (1) ... 2021 (47)

**10. What was the primary reason you became a Professional Development Specialist™?**

- ☐ I enjoy mentoring and coaching new ECE professionals
- ☐ I want to help ensure the ECE workforce is equipped with qualified educators
- ☐ I wanted to meet new people in the ECE field
- ☐ I want to contribute to the ECE field
- ☐ I wanted to learn more about educational environments
- ☐ To make extra money
- ☐ Other \_\_\_\_\_



*Display This Question:*

*If Do you have a CDA® credential? = Yes*

*And Do you have a CDA® credential? = No, my credential has expired*

**11. For each type of CDA® credential below, tell us if you ever had it, if you had it at one time and it has now expired, or you never had it?**

	Never had	Hold currently	Used to have but is expired
Center-based infant/toddler			
Center-based pre-school			
Family child care			
Home visitor			

**12. In which language(s) do you conduct Verification Visits?**

- ☐ English
- ☐ Spanish
- ☐ Amharic
- ☐ French
- ☐ Russian
- ☐ Other (which language?) \_\_\_\_\_

**13. When did you last receive Professional Development Specialist™ training?**

- ☐ Within the last year
- ☐ 1-3 years ago
- ☐ 3-5 years ago
- ☐ More than 5 years ago

**14. Please rate the following statements about the Professional Development Specialist™ application and training.**



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	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
It was easy to complete the application					
It was easy to follow the online training					
The Professional Development Specialist™ training helped me to understand the role and expectations of the Professional Development Specialist™					
The Professional Development Specialist™ training prepared me to support CDA candidates					
The Professional Development Specialist™ training prepared me to follow process and protocols to sign up for Verification Visits					
The Professional Development Specialist™ training prepared me to review and assess a candidate's portfolio					
The Professional Development Specialist™ training prepared me to observe and assess a candidate during the Verification Visit					
The Professional Development Specialist™ training prepared me to reflect with the candidate, focusing on areas of strength or growth found in the portfolio and/or seen during the observation					
The Professional Development Specialist™ training prepared me to submit the candidate's scores via the Scoring Tool in YourCouncil					

**The next questions we have are about the formal education you have completed.**

**15. What year did you graduate from high school or obtain your GED?**

**16. Please select all that apply**

- ☐ I have taken college-level classes either in a community college, a 4-year college or university



---

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- ☐ I have taken college-level classes that count toward obtaining my initial CDA® credential or to renew it
- ☐ I have an Associate's degree
- ☐ I am currently working toward an Associate's degree
- ☐ I plan to enroll in an Associate's degree program in the next 12 months
- ☐ I have a Bachelor's degree
- ☐ I am currently working toward a Bachelor's degree
- ☐ I have a Master's degree
- ☐ I am currently working toward a Master's degree
- ☐ I have a PhD, EdD, or similar doctorate degree
- ☐ I am currently working toward a PhD, EdD, or similar doctorate degree
- ☐ I hold a certificate or credential, other than the CDA® in early childhood education or child care (not including First Aid or CPR certification)
- ☐ Other (specify) \_\_\_\_\_

**Current Employment**

**17. When did you start working in early childhood education?**

- ☐ Less than 5 years ago
- ☐ 5-10 years ago
- ☐ 10-20 years ago
- ☐ More than 20 years ago

**18. Are you currently employed?**

- ☐ Yes, full time



- ☐ Yes, part time
- ☐ Yes, have multiple jobs
- ☐ No, not currently employed

*Skip To: Q46 If Are you currently employed? = No, not currently employed*

**19. Are you currently employed working with children birth to 5 years, including working as a home visitor or an administrator in an early childhood or pre-school program?**

- ☐ Yes, full time
- ☐ Yes, part time
- ☐ Yes, have multiple jobs
- ☐ No, not currently working with young children

*Skip To: Q36 If Are you currently employed working with children birth to 5 years, including working as a home vi... = No, not currently working with young children*

**20. If working with children under birth to 5 years, in what type of setting do you work?**

- ☐ Center with infant/toddlers
- ☐ Center with pre-school age children
- ☐ Center with both infant/toddlers and pre-school age children
- ☐ Family childcare
- ☐ As a home visitor

**21. What is your title at your primary job? Check one.**

- ☐ Center director
- ☐ Assistant center director

- ☐ Family child care provider
- ☐ Lead teacher
- ☐ Assistant teacher
- ☐ Teacher's aide
- ☐ Education supervisor/coordinator
- ☐ State or university administrator
- ☐ College professor/instructor
- ☐ Social Worker
- ☐ Psychologist/Therapist
- ☐ Home visitor
- ☐ Other (specify) \_\_\_\_\_

**22. Is the place where you work any of the following? Check all that apply.**

- ☐ Military program
- ☐ Migrant program
- ☐ Local, state, or another program funded by the federal government
- ☐ Nonprofit organization
- ☐ None of the above

**Now, we have some questions regarding the Verification Visit process.**

**23. Please rate the following statements about the Verification Visit process.**





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	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
YourCouncil is easy use to schedule CDA® Verification Visits					
I am clear on the policies and procedures governing my role and responsibilities as a Professional Development Specialist™					
The Professional Development Specialist™ Procedures Manual provides me with clear instructions on conducting candidate CDA® Verification Visits					
The verification visit allows me to give a fair assessment of a candidate's competencies in early childhood education					
I use the Reflective Dialogue agenda to guide my conversation with the CDA® candidate.					
I find the Reflective Dialogue agenda helpful in guiding my conversation with the CDA® candidate					
The overall credential assessment includes perspectives of people who can speak fairly to a candidate's competencies in early childhood education					

**24. Please rate the following statements about the Professional Development Specialist™ role.**

	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
The Professional Development Specialist™ role is what I expected when I became a Professional Development Specialist™					
I feel prepared to carry out Professional Development Specialist™ responsibilities					
I feel prepared to support CDA® candidates					
I am satisfied with the opportunities to mentor and coach CDA® candidates					



COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA

	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
I would like to do more Verification Visits each year					
I would like to do fewer Verification Visits each year					
My questions about protocols (e.g. scheduling, YourCouncil) are met with responsiveness from the Council					
My questions about supporting candidates (e.g. assessing observation, portfolio, reflective conversation) are met with responsiveness from the Council					
Being a Professional Development Specialist™ makes me feel more connected to the ECE field					
I would recommend becoming a Professional Development Specialist™ to colleagues in the ECE field					
Overall, I have felt supported by The Council for Professional Recognition as a Professional Development Specialist™					
I would like professional development training from the Council.					

## Technology

### 45. Do you own any of the following? Check all that apply

- ☐ Laptop
- ☐ Desktop
- ☐ Smartphone
- ☐ Tablet
- ☐ Other means of accessing the Internet (specify)

### 46. For each of the following devices, please indicate your comfort level.



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	Cannot use technology	Can use but in a limited manner	Can use in a basic manner	Can use with good proficiency	Can use with advanced proficiency
Work computer (desktop or laptop)					
Home computer (desktop or laptop)					
Tablet device					
Another type of device (please specify)					

**47. For each of the following activities, please indicate your comfort level using technology.**

	Cannot use technology	Can use but in a limited manner	Can use in a basic manner	Can use with good proficiency	Can use with advanced proficiency
Reading the news					
Completing training or a course					
Completing an application					
Attending meetings					
Facilitating/Leading meetings					
Teaching students					

**Demographics: We are almost done! The last few questions are about you. Note, this information will only be used to categorize the data that you provide and will not be used to identify you in any way. All information provided will be kept confidential.**

**48. Are you of Hispanic, Latino or Spanish origin?**

☐ Yes

☐ No

**49. What is your race? Check all that apply.**

☐ White

☐ Black or African American

☐ American Indian or Alaska Native

☐ Asian

☐ Native Hawaiian or other Pacific Islander



☐ Other (specify) \_\_\_\_\_

☐ Prefer not to say

**50. What is your age? (Years)**

☐ \_\_\_\_\_

**51. What is your gender?**

☐ Male

☐ Female

☐ Non-binary / third gender

☐ Prefer not to say

☐ Other

**52. What is your marital status?**

☐ Married

☐ Living with partner

☐ Divorced or separated

☐ Widowed

☐ Never married/Single

**53. Do you have any children of your own?**

☐ Yes, under age six years

☐ Yes, but older than six years



- ☐ Yes, both younger and older than six years
- ☐ No, do not have children

*Display This Question:*

*If Do you have any children of your own? = Yes, under age six years*

*Or Do you have any children of your own? = Yes, both younger and older than six years*

**54. Do you have adequate child care?**

- ☐ Yes
- ☐ No

**55. What are the languages you speak at home? Check all that apply.**

- ☐ Amharic
- ☐ Arabic
- ☐ English
- ☐ French
- ☐ Russian
- ☐ Spanish
- ☐ Other (specify) \_\_\_\_\_

**56. What was your household income before taxes in calendar year 2020? Please include the earnings of all working members of your household and any earnings that you have from assets such as rental or farm income, unemployment, or other benefits**

- ☐ Less than \$10,000
- ☐ \$10,001 to \$20,000
- ☐ \$20,001 to \$34,999



- ☐ \$35,000 to \$49,999
- ☐ \$50,000 to \$74,999
- ☐ \$75,000 to \$99,999
- ☐ \$100,000 or more
- ☐ Don't know

**57. In what country do you live?**

- ☐ China
- ☐ Egypt
- ☐ Panama
- ☐ United Arab Emirates
- ☐ United States
- ☐ Other (specify)

*Display This Question:*

*If In what country do you live? = United States*

**58. What state do you live in?**

\_\_\_\_\_

**59. What county do you live in?**

\_\_\_\_\_

*Display This Question:*

*If In what country do you live? = United States*

**60. What is your zip code?**

\_\_\_\_\_



**61. What is your first name? (Optional)**

\_\_\_\_\_

**62. What is your last name? (Optional)**

\_\_\_\_\_

Thank you for completing this survey. We may look to gather more information from survey respondents. If you would be willing to speak with us further about your responses and experiences with the CDA® credential process, please include your email address. We will contact you if there is more information we need from you.

## **9.5 SURVEY OF STAKEHOLDERS**

Welcome to the Council for Professional Recognition's Reimagining the Child Development Associate® (CDA) Credential Process Survey! Completing the assessment should take you no more than 5-10 minutes. Your response is voluntary, confidential, and will be used to enhance the agency's understanding of the perspectives of stakeholders in the early childhood sector about the CDA credentialing process. We ask that you please:

- 1) Base your opinions and responses on the current credentialing process
- 2) Represent the collective view of the organization you represent, to the best of your ability.

In order to protect confidentiality, no one at the Council for Professional Recognition will see your individual responses. BCT Partners will only provide aggregate reporting for demographic groups and work units with ten or more respondents. Your voluntary ratings and input are extremely important to this process. Thank you in advance for participating in the Council for Professional Recognition's Reimagining the CDA Credential® Process Survey.

**1. Name**

\_\_\_\_\_

**2. Current state where you work**

\_\_\_\_\_

**3. Current county where you work**

\_\_\_\_\_

**4. Current zip code where you work**

---

**5. What is your current affiliation with the Council? Please select all that apply.**

- ☐ Staff or representative of a training agency
- ☐ Staff or representative of a local government agency
- ☐ Staff or representative of a state government agency
- ☐ Staff or representative of a federal government agency
- ☐ Staff or representative of an organization that employs CDAs
- ☐ Staff or representative of an educational institution (college or university, vocational/training center, or workforce development center)
- ☐ Former Council staff
- ☐ Funder of CDA candidates
- ☐ Former CDA candidate
- ☐ Former Professional Development Specialist
- ☐ Parent
- ☐ Staff or representative of an association
- ☐ Staff or representative of a policy organization

**6. Did you complete another survey about the CDA credentialing process as a candidate or a PD Specialist in the last month?**

- ☐ Yes
- ☐ No

*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Former CDA candidate*

- 7. If you are a former CDA candidate, during what year(s) did you participate in the credentialing process?**

*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Former CDA candidate*

- 8. If you are a former candidate, what was the most recent outcome of your participation in the credentialing process?**

- ☐ Credentialed
- ☐ Renewed
- ☐ Denied
- ☐ Discontinued process
- ☐ Other (specify) \_\_\_\_\_

*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Former CDA candidate*

- 9. If you are a former candidate, rate your level of satisfaction with the overall process based on your past experience:**

- ☐ Extremely dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Somewhat satisfied
- ☐ Extremely satisfied

- 10. In what domain of early childhood education do you work? Please select the most relevant option:**



---

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- ☐ Higher education teacher preparation
- ☐ High school career/vocational training
- ☐ Direct services early childhood education program
- ☐ Local or state regulatory agency
- ☐ Do not currently work
- ☐ Membership or policy association
- ☐ Retired
- ☐ Other (specify) \_\_\_\_\_

**11. In what domain of early childhood education did you work?**

- ☐ Higher ed teacher preparation
- ☐ High school career/vocational training
- ☐ Direct services preschool program
- ☐ Local or state regulatory agency

**12. What is the name of the organization for which you currently work?**

\_\_\_\_\_

**13. What is your role in the organization? Please select the most relevant option.**

- ☐ Staff (delivering the services of the organization)
- ☐ Administrator
- ☐ Manager



*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Staff or representative of a training agency*

**14. What type of support do you provide CDA candidates? Please select all that apply:**

- ☐ My organization refers candidates to the Council
- ☐ My organization offers education training
- ☐ My organization offers portfolio development
- ☐ My organization supports candidates in the CDA application process

*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Staff or representative of an educational institution (college or university, vocational/training center, or workforce development center)*

**15. Does your institution offer credits for training hours?**

- ☐ Yes
- ☐ No

*Display This Question:*

*If Does your institution offer credits for training hours? = Yes*

**16. What type of credits?**

- ☐ Continuing education
- ☐ Degree track
- ☐ Other (specify) \_\_\_\_\_

*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Staff or representative of a local government agency*

*Or What is your current affiliation with the Council? Please select all that apply. = Staff or representative of a state government agency*

**17. Is the CDA currently a requirement for QRIS or subsidy programs?**



☐ Yes

☐ No

*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Staff or representative of a local government agency*

*Or What is your current affiliation with the Council? Please select all that apply. = Staff or representative of a state government agency*

*Or What is your current affiliation with the Council? Please select all that apply. = Funder of CDA candidates*

*Or What is your current affiliation with the Council? Please select all that apply. = Staff or representative of an organization that employs CDAs*

**18. Do you offer financial support toward the CDA requirements?**

☐ Yes

☐ No

*Display This Question:*

*If What is your current affiliation with the Council? Please select all that apply. = Staff or representative of a local government agency*

*Or What is your current affiliation with the Council? Please select all that apply. = Staff or representative of a state government agency*

**19. Would your agency be more supportive of the CDA if the Council had:**

☐ Workforce registries

☐ Real time data for candidates' completed training

☐ Real time data about training opportunities for candidates

☐ Training requirements for localities

**20. For each part of the credentialing process below, please indicate how effective you perceive that part to be. Optionally, we encourage you to provide a brief explanation as to why you selected your responses:**





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	Very ineffective	Somewhat ineffective	Somewhat effective	Very effective	Unsure/No Knowledge of this part
Application completion process					
Scheduling the standardized exam					
Locating an exam site					
Exam format and length					
Exam content					
Exam preparation materials					
Identifying a PD specialist					
Scheduling verification visits					
The PD Specialist assessment of the candidate					
The portfolio assessment process					

**21. What additional resources do you feel are needed to make the credentialing process as effective as possible? Select all that apply:**

- ☐ More PD Specialists
- ☐ More access to technology to engage successfully in the process
- ☐ More options for communication with Council staff
- ☐ More support for travel for candidates to exams or training
- ☐ More training options
- ☐ More exam options
- ☐ Remote exams
- ☐ More payment options
- ☐ More language options
- ☐ Expanded hours at the call center
- ☐ Payment plans
- ☐ Increased use of virtual Verification Visits
- ☐ Increased pay for PD Specialists that travel

☐ Other (specify) \_\_\_\_\_

**22. Overall, how would you rate the CDA credentialing process?**

- ☐ Extremely satisfied
- ☐ Somewhat satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Extremely dissatisfied

**23. What suggestions do you have for the Council to make the credentialing process as effective as possible? Please explain in detail.**

\_\_\_\_\_

## 9.6 STAKEHOLDER INTERVIEW PROTOCOLS

### Reimagining the CDA Interview Protocol

Thank you for offering your time and insights today, my name is [XX XXX] and I work at BCT Partners. BCT Partners is one of the top 100 largest Black-owned enterprises in the U.S. We have been nationally recognized by Forbes as one of the nation's top 200 management consulting firms and by Manage HR magazine as one of the top 10 DEI firms in the U.S. The Council has hired BCT to conduct a comprehensive review of its current CDA credentialing process. While our review will examine the process from a range of perspectives, our focus today is on the experiences and perceptions of key stakeholders in the early childhood education sector. As a result, BCT is conducting a wide range of interviews to help us better understand the various perspectives about the CDA credential process. Your insights will help the Council for Professional Recognition provide a more inclusive workforce environment and recommendations for further improvements to the CDA credential process.

Today, I will ask you a few questions about your perceptions of the CDA credential process. During our discussion. Your responses will be confidential and will only be shared in aggregate, so please be as candid and forthcoming as you can. There will be no penalty or repercussions for what you or others share in this interview. This means:

- (1) You can decline to answer any questions or leave at any time
- (2) We will not connect your name with what was said in any written reports; and
- (3) Only BCT staff will have access to the interview data.

Our final report will only provide summaries and anecdotes from what was learned.



We will be recording this interview via ZOOM, for research purposes only. PLEASE CONFIRM THAT YOU CONSENT TO SUCH A RECORDING OF THE INTERVIEW. [wait for confirmation then begin] Ask focus group questions (attached.)

Let's get started!

**[Facilitator: please turn on Zoom recorder]**

**Let's start with the first question,** what is your connection to the Council and the CDA process?

**Let's move on to the next question,** what are strengths of the CDA verification visit process?

**Let's move on to the next question,** what are weaknesses of the CDA verification visit process?

**Let's move on to the next question,** what improvements would you suggest to the CDA verification visit process?

**Let's move on to the next question,** what do you think works well about the PD Specialist role?

**Let's move on to the next question,** what would improve the PD Specialist's role in the credential process?

**Let's move on to the next question,** what improvements would you suggest to the overall CDA credential process?

**Let's move on to the next question,** what technology or other resources do you think would add value to the CDA credential process?

**Let's move on to the next question,** what, if anything, do you think the Council for Professional Recognition can do to better support candidates pursuing the credential?

**Let's move on to the next question,** how would you describe the value the Council add to the ECE sector?

**Let's move on to the next question,** what do you perceive to be the biggest challenges for candidates working toward the CDA credential?

**Let's move on to the next question,** what could the Council do to increase your/your organization's support for the CDA credential?



## 9.7 FOCUS GROUP QUESTIONS CROSSWALK

Question	Accommodations	Monolingual	Urban/Suburban	Remote	Rural	Tribal	Migrant	Incomplete Process	PDS	Stakeholder
In 30 seconds or less, tell us what is the most important reason you went into early childhood education?	X	X	X	X	X	X	X	X	X	X
What value does the CDA credential bring to your career?	X	X	X	X	X	X	X			
Why did you become a PD Specialist?									X	
What are strengths of the CDA verification visit process?	X	X	X	X	X	X	X	X	X	X
What are the weaknesses of the CDA verification visit process?	X	X	X	X	X	X	X	X	X	X
What improvements would you suggest to the CDA verification visit process?	X	X	X	X	X	X	X	X	X	X
Talk about what was helpful and what was not helpful about working with the PDS?	X	X	X	X	X	X	X	X	X	X
What would improve the PD Specialist's role in the credential process?	X	X	X	X	X	X	X	X	X	X
What improvements would you suggest to the process for taking the exam?	X	X	X	X	X	X	X			
What works well about the online application process?	X	X	X	X	X	X	X	X	X	X
What barriers did you encounter when trying to earn your CDA credential?	X	X	X	X	X	X	X	X		
How did those barriers impact your ability to pursue the credential?	X	X	X	X	X	X	X	X		
What improvements would you suggest to the CDA credential process?	X	X	X	X	X	X	X	X	X	X
If you had to make three recommendations about the process for monolingual (non-English) communities what would they be?		X							X	
What technology or other resources do you think would add value to the CDA credential process?	X	X	X	X	X	X	X	X	X	X



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How difficult was it to navigate the accommodations process?	X									
What, if anything, would you change about the accommodations request/approval process?	X									
How did the Council's decision about your accommodation request (whether approved or denied) affect your ability to earn the credential?	X									
What, if anything, do you think the Council for Professional Recognition (who administers the credential) can do to better support candidates pursuing the credential?	X	X	X	X	X	X	X	X	X	X
What, if anything, do you think the Council can do to better support PD Specialists?									X	
How would you describe the value the Council adds to the ECE sector?										X
What do you perceive to be the biggest challenges for candidates working toward the CDA credential?										X
What could the Council do to increase your/your organization's/agency's support for the CDA credential?										X
If you renewed your CDA, and/or intend to renew, why did you make this decision?	X	X	X	X	X	X	X			
If you did not renew your CDA, and/or don't intend to, why did you make this decision?	X	X	X	X	X	X	X			
Is there anything specific to living in a remote area that you think is important to consider with regards to the CDA credential process?				X						



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COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA

Is there anything specific to living in a rural area that you think is important to consider with regards to the CDA credential process?					X					
What is one thing that the CDA process should change/consider when working with candidates who work with migrant communities?							X			
What is one thing that the CDA process should change/consider when working with candidates who work with tribal communities?						X				





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## **COUNCIL FOR PROFESSIONAL RECOGNITION** **REIMAGINING THE CDA® PROCESS**

Submitted by BCT Partners  
*January 23, 2023*

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**BCT PARTNERS**  
*Your Partner in Solutions that Matter*

BCT Partners  
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COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA PROCESS REPORT

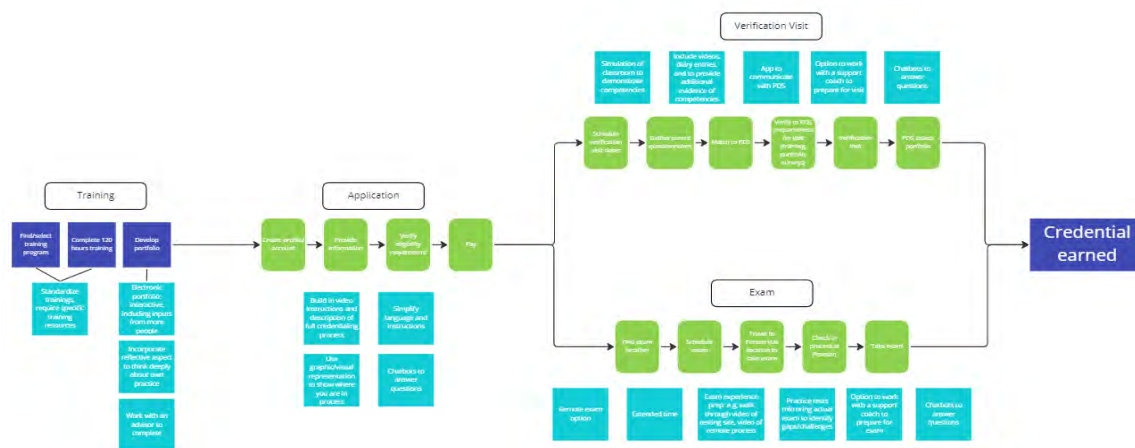
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## Process Overview

Over the last year and a half, BCT Partners (BCT) has been working with the Council for Professional Recognition (the Council) to improve the Child Development Associate® (CDA) credentialing process. This effort started with an intensive review and analysis of experiences and perceptions of the credentialing process by applicants, credential holders, Professional Development Specialists (PD Specialist), and various partners in the early childhood education (ECE) field. Through a precision analytics process, BCT was able to segment the population of candidates into distinct profiles based on demographic, socioeconomic characteristics, and statistics related to the profiles' success with the CDA® process. From the analysis, the Council, with BCT's guidance, generated ideas to improve the credentialing process and, ultimately, outcomes for applicants. These ideas have been refined and prioritized based on both what would have the greatest impact on the most applicants, as well as what is most feasible.

In an effort to gather feedback on the prioritized ideas, BCT Partners facilitated 11 focus groups with a range of stakeholders, including a wide spectrum of applicants and CDA credential holders (CDAs), PD Specialists, and candidate preparation partners (e.g., training organizations), with a total of 61 participants. The CDA focus groups were organized by education level, which is a key characteristic of the profile distinctions, as well as languages spoken, which were English, Spanish, and Arabic. The aim of the focus groups was to understand perceptions of the proposed ideas, as well as considerations to ensure the ideas address challenges and needs of applicants in the process as intended.

In each focus group, participants were provided brief context about challenges applicants experienced during each step of the credentialing process, followed by the Council's ideas to address the challenges. Focus group facilitators also showed a process map of the credentialing process with the proposed ideas (see Figure 1). Participants were asked to respond to specific questions about each proposed idea (see Appendices for the full focus group protocols).



***Figure 1: Candidate Process with Proposed Ideas in Teal (See also Appendix D)***

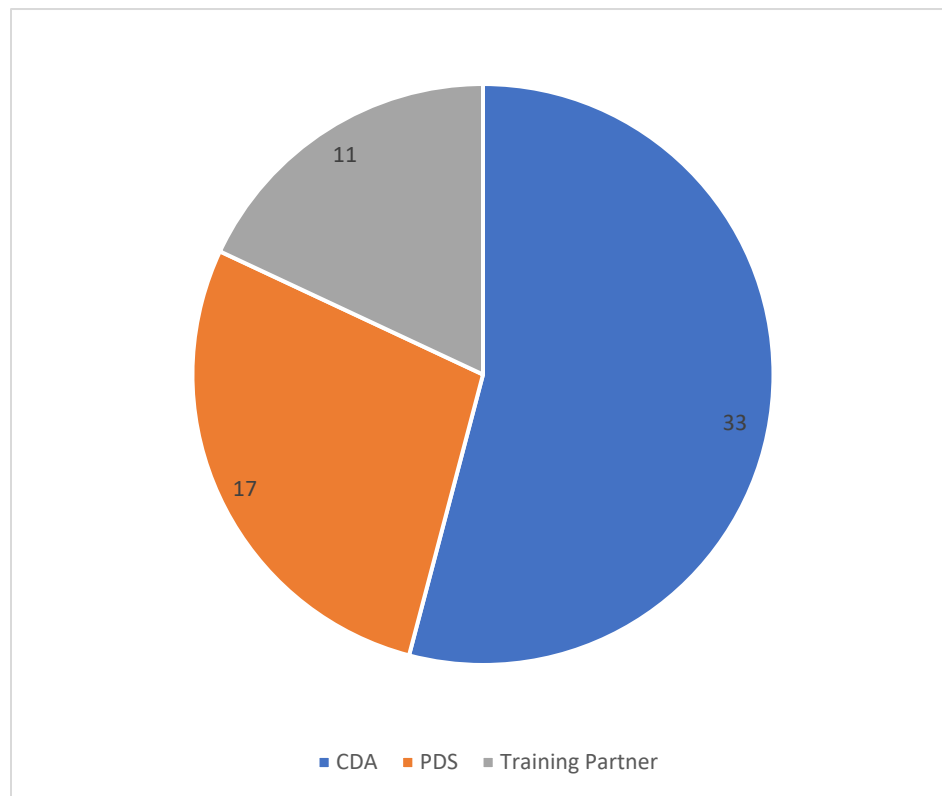
Following the focus groups, the BCT Partners team synthesized all responses and provided recommendations to the Council. A summary of the findings, including the perceived benefits, concerns (when applicable), and considerations gleaned from the focus groups is outlined below.

## Participants

BCT worked with the Council to identify participants for the focus groups. The Council sent an email to several hundred individuals from the CDA network, which included a link to indicate interest and provide demographic, educational, and role information. For CDA/candidate focus groups, BCT invited everyone who responded to the survey to a focus group, with the exception of those who are also PD Specialists. For PD Specialist groups, BCT considered race/ethnicity, education, geography, as well as availability, to create a representative group of PD Specialists. The below charts provide information about who participated in the focus groups.

### All Focus Group Participants

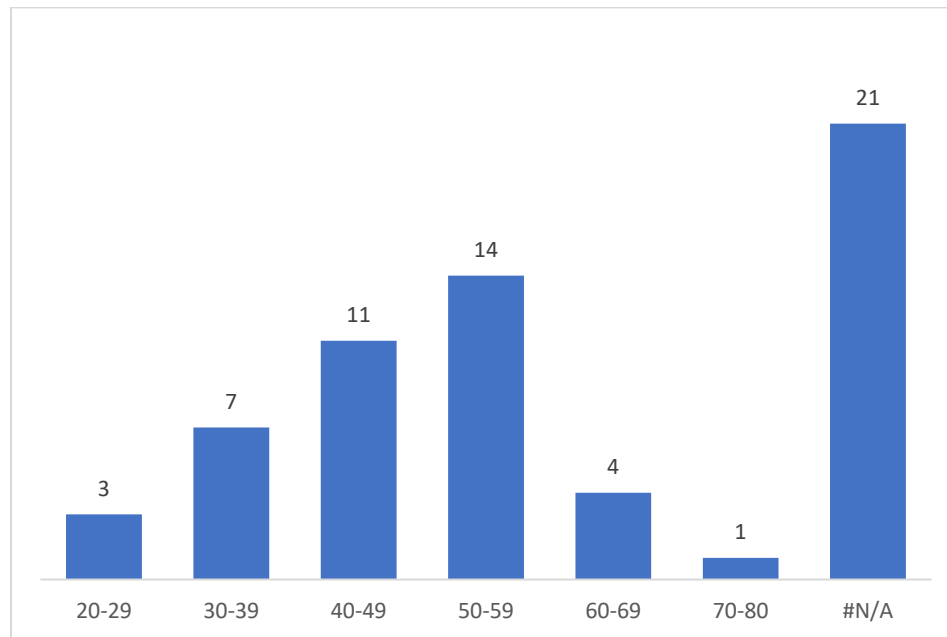
As mentioned above, there were a total of 61 focus group participants. The following charts provide a summary break down of roles of participants, ages, location, gender, and primary languages spoken by participants across all 11 focus groups.



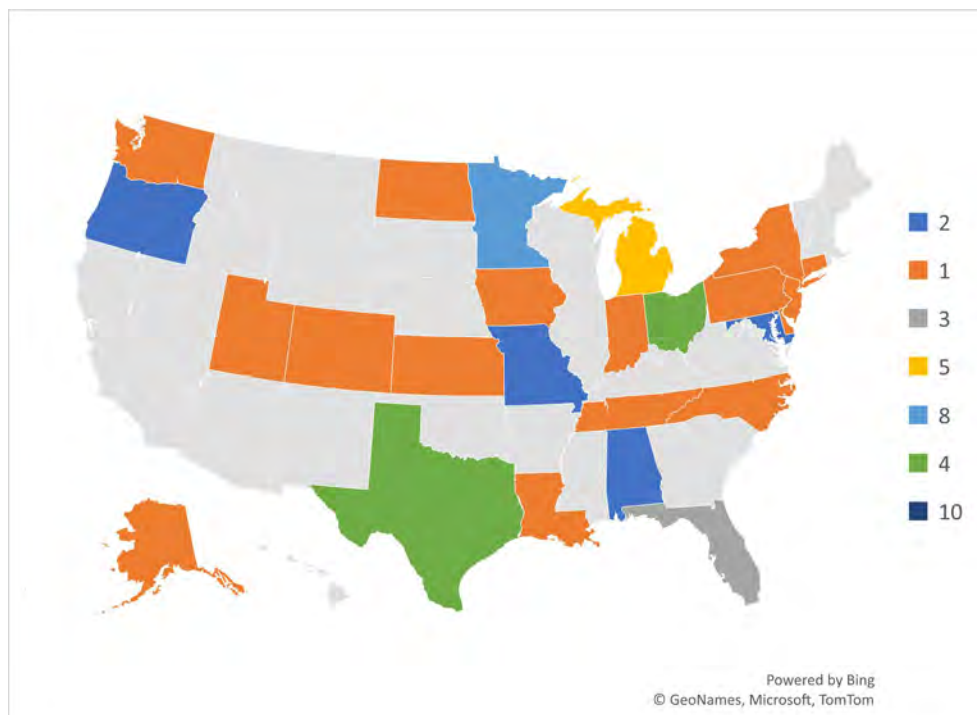
***Figure 2: Number of Participants by Role***



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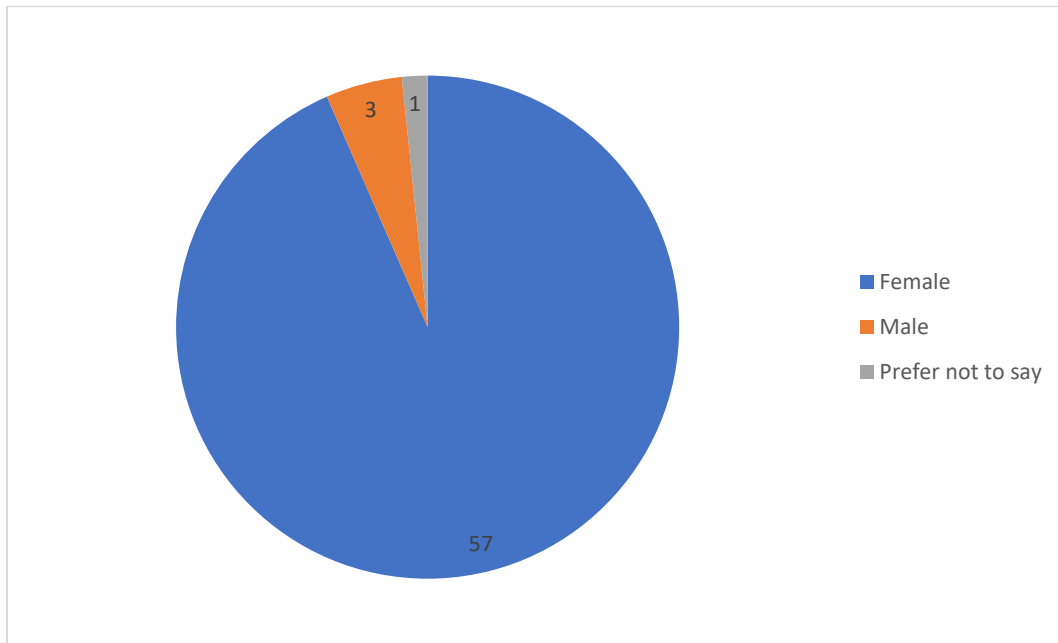
**Figure 3: Age Range of All Participants**



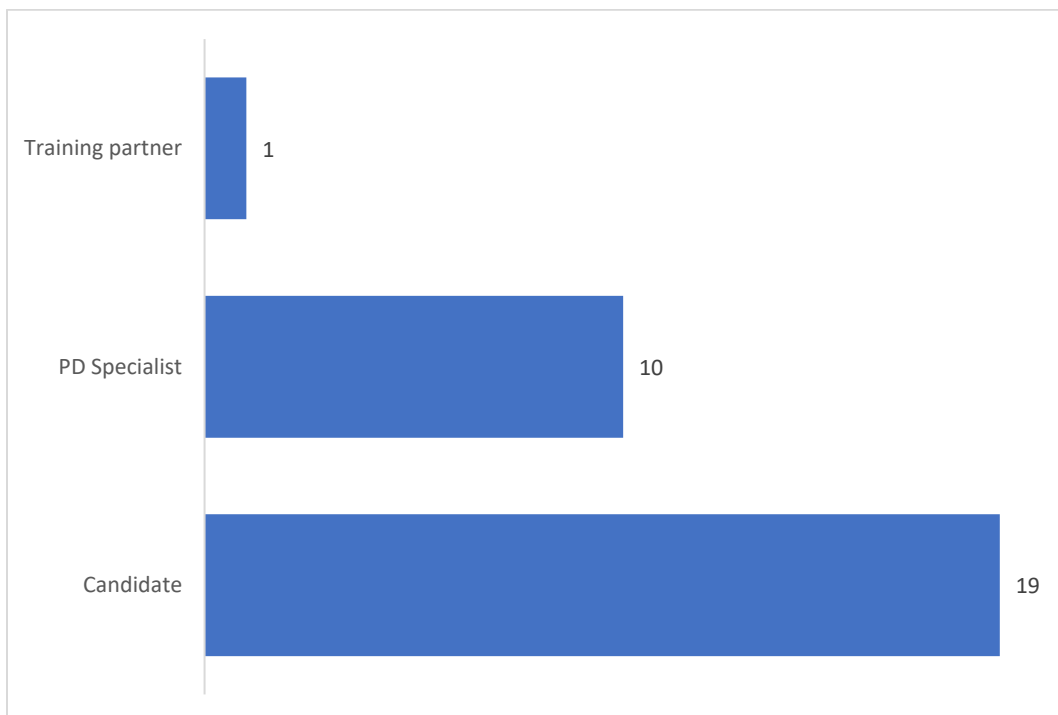
**Figure 4: Participants by State<sup>1</sup>**

<sup>1</sup> Map is missing 3 participants from Puerto Rico

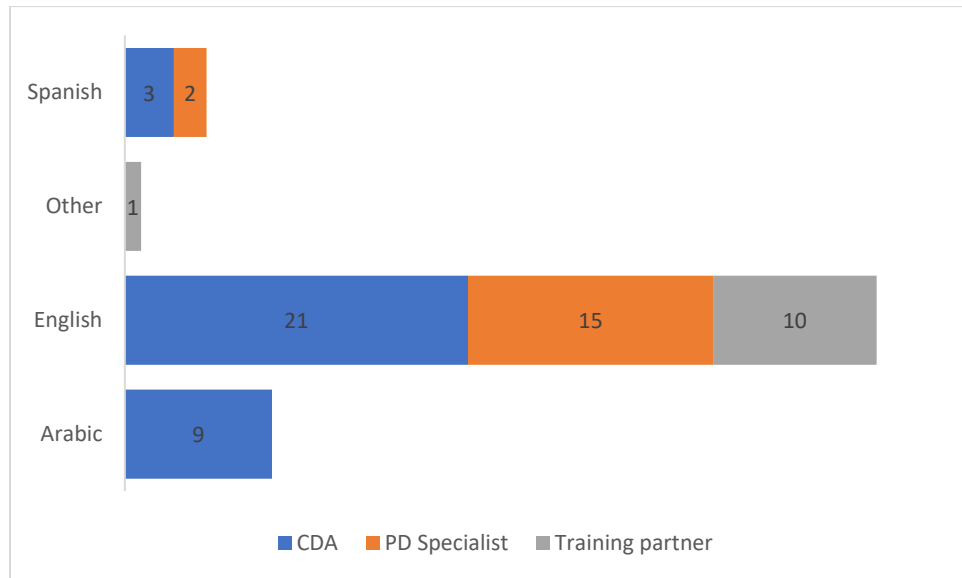




**Figure 5: Gender Identify of All Focus Group Participants**



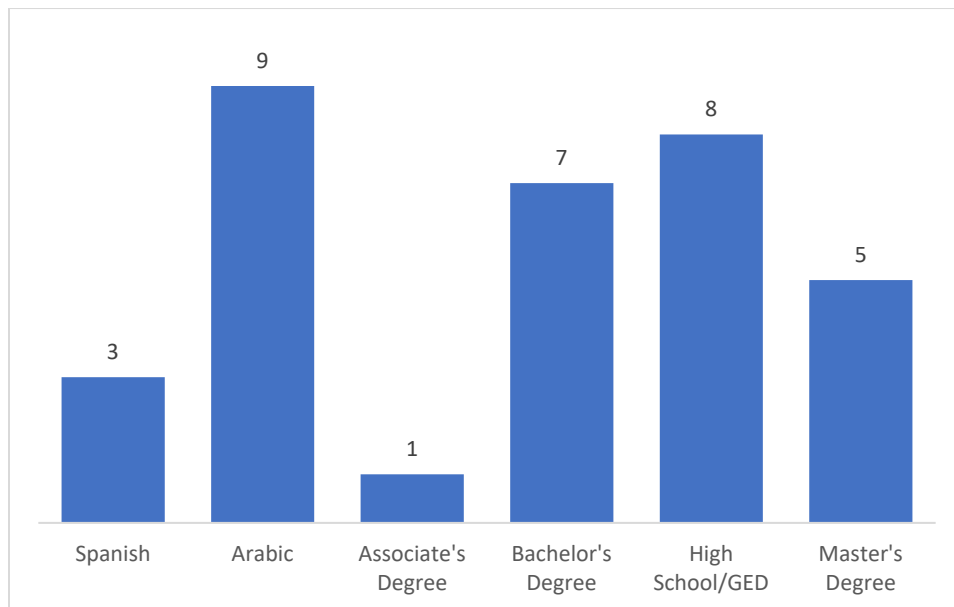
**Figure 6: Participants with CDA Credential by Role**



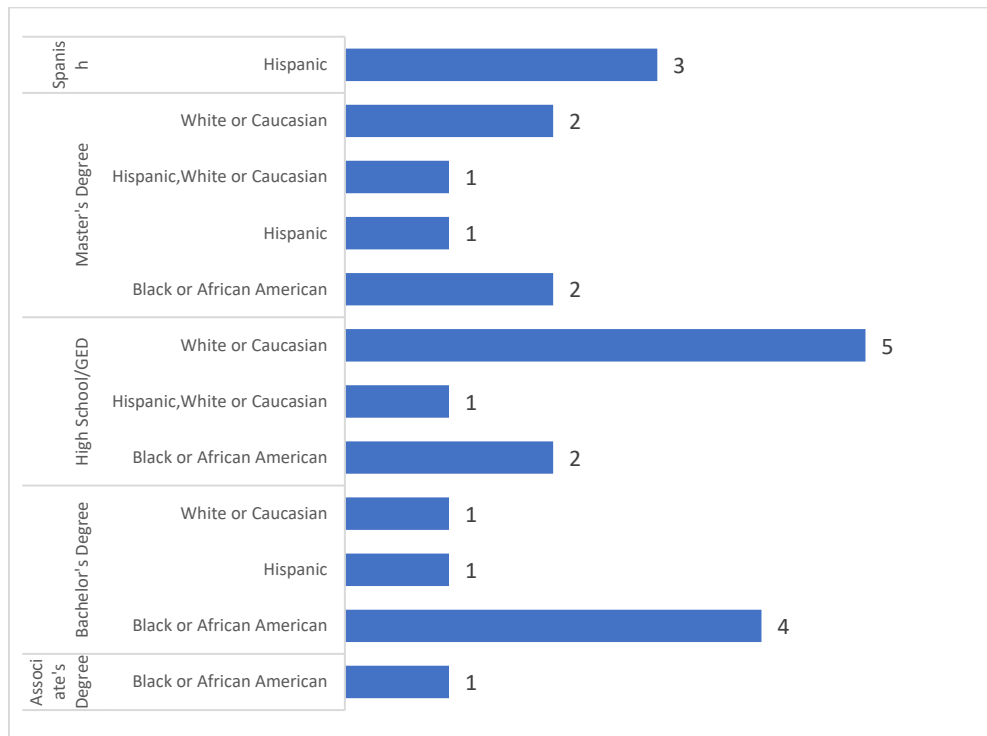
**Figure 7: Primary Languages Spoken**

### CDA Participants

The below two charts provide further information about the participants in the CDA focus groups, including numbers of participants in each group and race/ethnicity of participants by group.



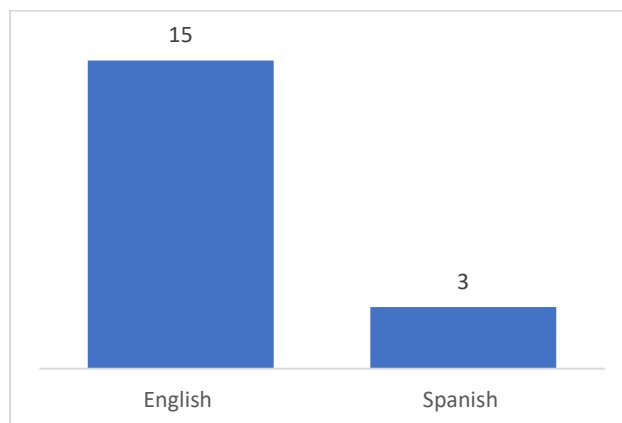
**Figure 8: Number of Candidates by Group**



**Figure 9: CDA Groups by Race/Ethnicity (Excluding Arabic Group<sup>2</sup>)**

### PD Specialist Participants

The following charts provide information about PD Specialists that participated in focus groups, including primary language, race/ethnicity, and education.

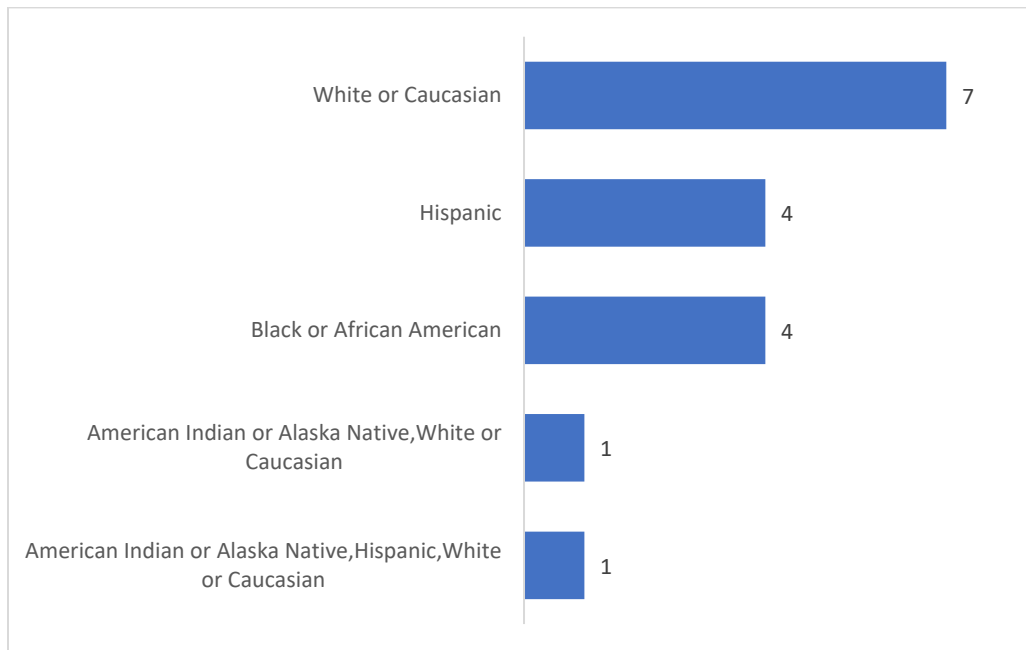


**Figure 10: PD Specialists by Group Language**

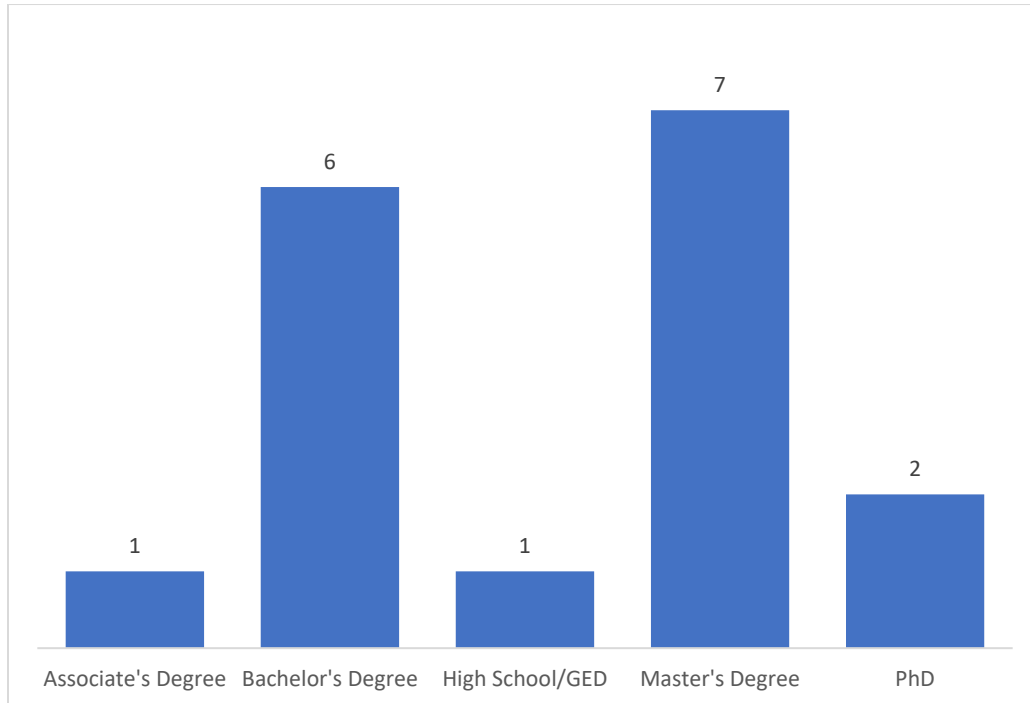
<sup>2</sup> \*The Arabic focus group was selected differently and this data was not collected about each participant.



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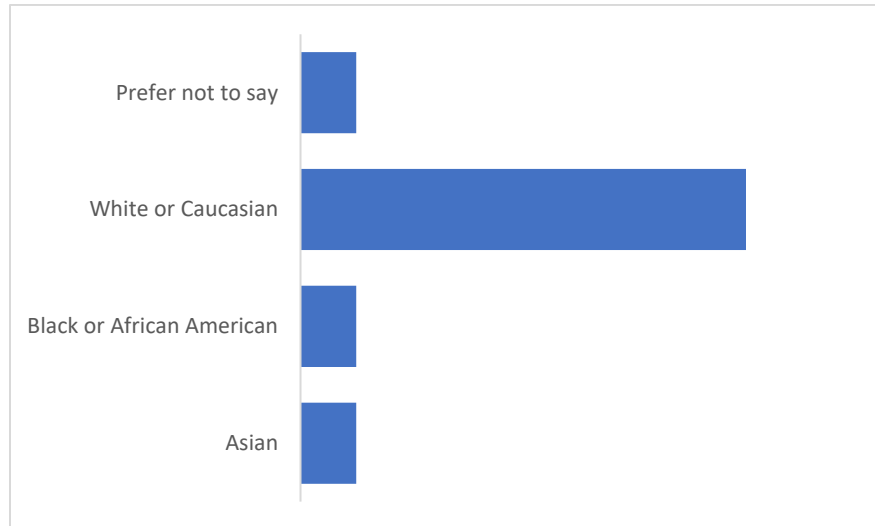
**Figure 11: PD Specialists by Race/Ethnicity**



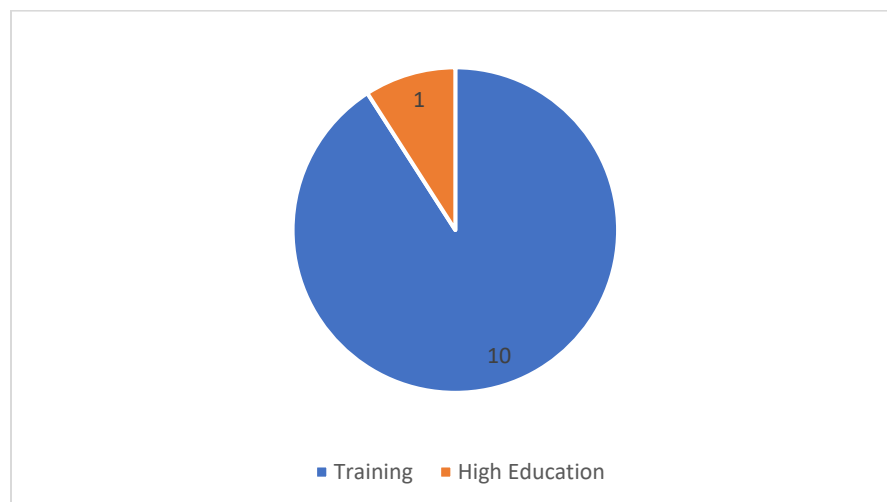
**Figure 12: Education of PD Specialists**

### Training Partner Participants

The training partner focus group included 11 individuals coming from 7 different organizations. Of these individuals, 3 (27%) come from Gold Standard organizations. The following charts provide information about training partners that participated in focus groups, including race/ethnicity, as well as information about the types of organization they represent.



**Figure 13: Training Partners by Race/Ethnicity**



**Figure 14: Training Partners by Type of Organizations**

## Feedback on Proposed Ideas

BCT Partners facilitators synthesized the feedback heard from all focus groups to find trends and themes in responses. The following section provides detailed summaries of participant feedback to each idea proposed to improve the CDA credentialing process.

### Training Standardization

The Council proposed standardizing elements of the CDA training, specifically requiring all training programs to use specific training materials and resources. Focus groups participants were asked about:

- Whether they think it is useful to create universal standards for training that include requiring specific resources to be used by trainers
- Barriers or obstacles to making this change
- What would need to happen to successfully implement training standardization

### Benefits

There was widespread agreement that some standardization of the CDA training would be beneficial to ensure program quality. Participants from all groups—credential holders, PD Specialists, and partner organizations—acknowledged there is a wide array of training options that range in quality. These disparities in training quality lead to disadvantages in the credentialing process for candidates who receive lower quality training compared to those who receive higher quality training. Therefore, standardization of trainings could eliminate some of these disparities.

### Concerns

While all groups agreed that some standardization might be beneficial, the groups of PD Specialists and partner organizations expressed concerns. Both PD Specialists and partner groups were concerned that standardization would not allow training to be tailored to specific contexts, which is an important aspect and principle of the CDA credential. They noted that while the Council's educational materials, including *Essentials for Working with Young Children*, are valuable, they do not (and cannot) sufficiently drill down into the specifics of demonstrating competencies in the communities where candidates live and work. Partner organizations were also concerned about the expectations related to covering the cost of materials. Some organizations buy the workbooks for participants but do not buy the textbooks because of cost; other organizations do not even buy the workbooks for participants. They are concerned they would be expected to buy more materials they cannot afford (e.g., textbooks, workbooks), particularly as they also have expenses related to aligning with national standards. They also have concerns about passing the cost on to candidates, who may not be able to afford the resources in addition to course registration. Some CDAs also raised questions in their focus groups about who will pay for these resources if they become required.

Lastly, partner organizations also articulated concerns about standardizations aligning with all state requirements, registries, and approval systems. Given the wide range of systems and requirements across all states, partners were skeptical that standardization of trainings could work.



### *Considerations*

Given the acknowledgment there could be value in standardizing the trainings more, participants in all the focus groups offered suggestions and considerations to effectively implement this change, should the Council decide to do so. Partner organizations expressed the importance of making sure any standardization aligns with registries and approval systems in every state, as well as aligning with national standards. They also stressed the need to ease into any standardization requirements to allow organizations the time and ability to prepare for such a transition.

Regarding the concern about cost, participants suggested making an online version of *Essentials* to be accessible anywhere and at a lower cost. Additionally, perhaps the Council could offer subscriptions or discount options to make it more easily attainable for candidates and training organizations.

Lastly, partners and CDAs suggested focusing on trainers as a way to improve quality of trainings. Partners suggested building capacity of trainers to be sure they are equipped with the skills and knowledge to provide high quality trainings. CDAs, particularly in the non-English speaking groups, indicated the most important consideration about training is that trainers must be culturally competent and sensitive to candidate needs, including speaking candidates' languages.

### *Electronic Portfolio*

The Council proposed creating an electronic portfolio option to allow candidates to have a more interactive portfolio experience and include inputs from more people. Focus group participants were asked:

- What they think about the option of an electronic portfolio
- Whether allowing more input from more people would be helpful to the process
- Whether they would find it helpful to incorporate more reflective aspects of the credentialing process
- Advantages and disadvantages to a separate portfolio login from registration and application

### *Benefits*

Participants across all groups responded positively to the idea of an electronic portfolio. CDAs perceived this change could offer increased opportunities to be creative, particularly if it allows the ability to upload pictures and videos to demonstrate competencies. Allowing candidates to show competencies through videos would help those who communicate better verbally than in writing, particularly those for whom English is not a first language. They also responded positively to the opportunity to allow more input from more people, particularly colleagues who are deeply familiar with and able to speak to their competencies. Additionally, they responded positively to incorporating more reflective questions into the portfolio.

PD Specialists particularly appreciate that an electronic portfolio would allow them to review it in advance of the Verification Visit. Some PD Specialists do not think there is value to including input from more people, while others think it is fine to do so. They did respond positively to including more reflective questions into the portfolio, which could make the reflective dialogue more efficient in the limited time a PD Specialist has with a candidate.

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While this idea was well liked by all groups, it was most highly appreciated by CDA groups with higher levels of education. These CDAs suggested it would be easier to work with an advisor, trainer, or other mentor to get feedback throughout the portfolio development process. One participant mentioned a CDA course where they use shared Google documents to submit components of their portfolio to the instructor for feedback and print their completed work to paste into their portfolio. This process could be integrated into an electronic portfolio development process more broadly. An electronic portfolio would also make it easier to gather input from additional people, including families, by sending them a link to fill out a survey rather than relying on paper surveys.

Participants from the partner organizations, generally, reacted positively to the electronic portfolio. Some said it should definitely be an option, particularly since some trainings happen exclusively online. This is also an opportunity to create a user-friendly format that simplifies the portfolio development process for candidates with fillable sections that do not require referencing information and examples in multiple places.

### *Considerations*

The most articulated consideration across most focus groups is that, if an electronic portfolio option is introduced, there must still be an option for applicants to create a hard copy version of the portfolio. Older CDAs are less likely to want another electronic tool, though they realize it could be valuable for some candidates. Non-English-speaking groups liked the idea but expressed concern that it might create challenges for those who are not technologically literate and/or have limited internet access. Partner organizations want to be sure candidates who do not have a computer and/or have limited technological skills can continue to create a physical portfolio.

CDAs had mixed feelings about an electronic portfolio option with a separate account login. Some participants see it as an expectation, whereas others expressed concerns about having another system to keep track of.

A few participants in CDA groups mentioned concerns about security breaches with an electronic portfolio and wanting to make sure any system is properly secured to avoid loss of work and sharing of personal information.

Professional Development Specialists would like to see the review process of the portfolio streamlined and simplified with an electronic version. Specifically, they would like to be able to assess the portfolio ahead of the visit, to spend less time reviewing it when with the candidate, and more time in a visit on the reflective dialogue.

### *Advisor*

The Council proposed re-introducing the advisor role to support individuals in the process of preparing to apply for their CDA. The advisor, which was a role that existed in an earlier iteration of the credentialing process, would be a mentor in the early childhood education sector for applicants as they prepare to apply for the CDA credential. Focus group participants were asked:

- Important considerations for the advisor role to make it valuable for potential CDA applicants (e.g., location, availability, experience, access, process to find an advisor)

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- About concerns finding an advisor
- Whether an advisor should be in an individual's community or if this could be a virtual support role

### *Benefits*

Participants across all CDA focus groups liked the idea of having someone to provide support as individuals prepare for the CDA. Noting that it can be an intense process, they liked the idea of having someone familiar with the CDA process be a guide to them. Many CDAs indicated having people through their training programs who served this role, and that it was very helpful. Re-introducing the advisor role as part of the process would create a more consistent, standardized experience for candidates, with everyone benefiting from support leading up to the application process. Non-English-speaking CDAs articulated a need to have advisors that speak the same language as the individual being supported.

PD Specialists who experienced the process with the previous iteration of the advisor role noted that it was a valuable resource for individuals preparing for the credentialing process.

In the partner organization focus group, participants shared that many organizations, programs, and states already have a model that connects candidates to advisors. Where this exists, is seen as very effective and valuable to help individuals through the credentialing process.

### *Concerns*

One concern related to introducing the advisor role is that there would be too many people involved throughout the process, creating confusion about who to go to when seeking help. For CDAs, this was expressed if there is both an advisor through the Council as well as through a training program. Some PD Specialists expressed concern that there would be inconsistent information given when there is both an advisor and a PD Specialist involved.

CDAs also expressed concern about finding advisors that are committed to supporting them in the process and have the bandwidth to do so. If they have to find someone on their own, some might have challenges finding someone who has both the time as well as the expertise and knowledge to play this role. They also would not want it to become a requirement that someone is just checking off boxes, but that they are advising them.

### *Considerations*

CDAs expressed that an important qualification of the advisor would be that it is someone who is deeply familiar with the CDA credentialing process, specifically that it should be an individual who either has a CDA or works for the Council. PD Specialists, similarly, said that anyone who becomes an advisor should be vetted by the Council to be sure they are sharing correct information with the candidates about the credentialing process. Partner organizations articulated that, where this kind of role is already happening, it should be allowed to fit into the Council's advisor model to avoid duplicating efforts, causing confusion, and to bolster programs that are already experiencing success.

Participants in all groups agreed that it would be most ideal to have an advisor within an individual's community, but that this role can be a remote one as long as the advisor is mindful of the individual's learning style and language. It would be best to have both in-community and remote options for those

who live in communities where it is likely hard to find someone, for example in small and/or remote communities. Ideally, the Council could help facilitate finding an advisor, particularly for those who reside in smaller or remote areas and/or cannot find someone within their own community.

### Application Enhancements

The Council proposed improvements to the application process and system to make it easier to navigate. The specific features include building in video instructions and a description of the full credentialing process, simplifying language and instructions in the application, and using graphic/visual representation to show applicants where they are in the process. Focus group participants were asked:

- What they think of each of the ideas
- Whether these changes would help individuals navigate the process more easily

### Benefits

Each focus group liked all the ideas for improving the application. In particular, CDAs and PD Specialists noted that video and graphic representation would make the application easier to navigate and including video instructions helps appeal to different learning styles and needs. CDAs appreciated these ideas because many have found the current application system confusing and counterintuitive and would prefer a simplified, more user-friendly, application process.

### Considerations

Participants, particularly in the non-English-speaking groups, asked that all application improvements include other languages so all applicants can benefit from the enhancements. Specifically, graphics and videos in other languages will be helpful for non-English-speaking applicants.

Bilingual (English/Spanish) CDAs also requested having both English and Spanish translations in the same place, rather than separate applications. This request was largely because of perceived inconsistencies in translations and would allow them to review instructions in both languages while completing the application.

Given the application is all online, CDAs said there should be a good technology support team to address any glitches and assist applicants having issues. PD Specialists commented that the current site is hard to use and often glitches, so the application system must work smoothly for these enhancements to be of value. Additionally, a resource page or frequently asked question page would make it easier for applicants to find information they need.

### Chatbots

The Council proposed introducing chatbots to give applicants and candidates access to a 24/7 service to answer commonly asked questions immediately. Focus group participants were asked:

- What they think of this idea and whether it would help individuals navigate the process more easily
- Whether adding chatbots to answer commonly asked questions alongside other digital tools, and/or support coaches, would help alleviate most of the communication issues throughout the process

- What would make a tool like this most helpful

### *Benefits*

Participants in all groups like the idea of having a 24/7 access point to the Council to ask questions. Some CDAs said they like this idea because it can be preferable to type in questions rather than waiting on the phone for a response, particularly for general questions that should be quick to answer. The primary interest in having chatbots is to have an easy access point to the Council to obtain information needed to navigate the credentialing process when questions arise.

### *Concerns*

The primary concern expressed by most CDAs about chatbots is that they want to know there is a person behind the chat to answer questions. CDAs and PD Specialists articulated frustrations trying to get answers to questions and be in contact with the Council and they want the chatbot to be an avenue to connect with people at the Council for assistance when they need it. Non-English-speaking CDAs were most concerned that a chatbot would allow applicants and candidates to ask questions in the chat in their own language. PD Specialists raised concern about chatbots replacing opportunities to speak with people.

### *Considerations*

Overall, for the chatbot to feel valuable to candidates and PD Specialists, they need to know that their questions will reach a person and will ultimately lead to having their questions answered in a timely manner. The chatbot could also lead to a resource page with links to information about the whole process, which candidates would likely find helpful to have commonly asked questions easily answered. As long as the chatbot is part of a broader communication and support system, and there are still opportunities to speak with people, it could be a valuable tool to address communication issues with the Council.

### *Simulation Verification Visit*

The Council proposed exploring the use of classroom simulations to collect evidence of candidates' competencies as a virtual option in place of a traditional in-person Verification Visit in a candidate's classroom. CDA focus groups were asked:

- Thoughts on expanding how the Council does verification visits
- Whether they foresee challenges in allowing candidates to demonstrate competencies in different ways than have been done, particularly with an in-person, live verification process
- What complications they anticipate

### *Benefits*

CDAs across all groups expressed excitement about ideas that would allow the Verification Visit process to happen more efficiently, with many people citing experiences of long wait times and scheduling challenges, particularly during the pandemic. They expressed that new ways of verifying competencies that facilitate an easier logistical process are valuable, and that the downside of losing the real-time, in-person experience was okay because a Verification Visit is never a fully accurate representation of a typical day when they are aware that someone is watching them. The groups most excited about

introducing new options for verifying competencies were those with High School/GED level of education, as well as those with some higher education.

### *Concerns*

There were some concerns raised by CDAs across all groups about introducing a simulation option to verify competencies. One concern is that people often know how to answer questions based on what they should do, but it may not fully capture what a candidate actually would do in a situation. For example, someone might know what they should do when encountering a challenge in a classroom, but when confronted with that challenge, may not actually respond that way when there are several children with competing needs and additional distractions present. Additionally, a simulation will not capture everything you would see in a real environment. In particular, it would not capture the nuances of an individual's specific work environment, for example different layouts, equipment, and other factors that may be unique to where someone works.

PD Specialists were not specifically asked about simulations as an option. However, they did express opposition to Verification Visits that are not live, and ideally in person, because they believe those are the only true ways to demonstrate and verify competencies in early childhood education.

### *Considerations*

Overall, focus group participants had a difficult time envisioning what a simulated verification experience would actually look like and how it would fit into the process, so much of the discussion about simulations was more broadly about the value of alternatives to an in-person Verification Visit. CDAs talked about increasing virtual visits by video conferencing as an example of what they are familiar with and see as valuable.

### *Additional Forms of Evidence*

The Council also proposed an option to provide videos, diary entries, and other forms of submission to demonstrate evidence of competencies. CDA focus groups were asked:

- Thoughts on expanding how the Council does Verification Visits
- Whether they foresee challenges in allowing candidates to demonstrate competencies in different ways than have been done, particularly with an in-person, live verification process

### *Benefits*

CDAs articulated the same benefits to this idea as the simulation: new ways of verifying competencies that facilitate an easier, more efficient, and timelier logistical process are valuable, and the downside of losing the real-time, in-person experience was okay because a Verification Visit is never a fully accurate representation of a typical day when they are aware that someone is watching them. Additionally, this idea would allow individuals with different communication styles to present evidence in ways that best captures their competencies. As with the simulations, the groups most excited about introducing new options for verifying competencies were those with High School/GED level of education, as well as those with some higher education.



### *Concerns*

Some of the concerns about providing additional forms of evidence mirrored the concerns about a simulation to demonstrate competencies: people often know how to answer questions based on what they should do, but it may not fully capture what a candidate actually would do in a situation. Although PD Specialists were not asked specifically about this option as a substitute to the current visit process, again, they did express that additional evidence could be valuable, but not to replace a live (and, ideally, in-person) visit. Additionally, CDAs spoke about one logistic challenge being that it can be hard to plan for events they might want to capture, and thus not knowing when to video. There may also be challenges around getting permission to video children.

### *Considerations*

In the discussion about this proposed idea, some CDAs noted there could be an opportunity to tie this form of demonstrating evidence of competencies to an electronic portfolio, if that is developed. CDAs also want the Council to consider that many candidates might not have up-to-date technology, so any systems in which evidence is uploaded should be able to support different video formats.

### *Auto-Assign Professional Development Specialists to Candidates*

The Council proposed beginning to automatically assign a PD Specialist to a candidate or providing a list of several PD Specialists in their area for a candidate to contact, in place of the current system of candidates identifying and reaching out to a PD Specialist. Participants were asked about their thoughts on this idea.

### *Benefits*

CDAs and PD Specialists articulated this option could be valuable for candidates who are in areas where there are not many PD Specialist options. For example, for candidates in more remote or rural areas where there are only a few PD Specialists for the whole area (or, at times, none at all), assistance matching would be helpful. A system like this might also reduce the time spent reaching out to multiple PD Specialists, if PD Specialists' availability is incorporated into the matching process.

### *Concerns*

Some CDAs expressed concern that automatically assigning a PD Specialist would be difficult to coordinate and might lead to challenges in communication.

PD Specialists did not like this idea because, they said, a candidate selects a PD Specialist based on specific criteria, and they want to be sure those criteria are still considerations in how a PD Specialist is matched to a candidate. Specifically, they mentioned selecting based on distance, and expressed concern that a PD Specialist might be matched to a candidate farther away.

### *Considerations*

If the Council moves toward a system of assigning PD Specialists or providing a select list of PD Specialists to a candidate, these assignments should be based on the same selection criteria that candidates currently use to find a PD Specialist on their own.

### Support Coach

The Council introduced the idea of an option for a candidate to work with a support coach for scheduling help with their Verification Visit and/or the exam. A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to the credentialing process. For the Verification Visit, specifically, a support coach could help an applicant navigate challenges related to scheduling and finding a PD Specialist; for the exam, a support coach could help an applicant navigate challenges related to scheduling and finding a testing site. Focus group participants were asked:

- What would make a support coach valuable for helping someone through the Verification Visit process
- What would make a support coach valuable for helping someone through the exam process
- How the addition of a support coach could help PD Specialists
- Any challenges that might arise with the introduction of support coaches

### Benefits

CDAs of all groups expressed that any support to help with scheduling would be valuable for candidates in the process. Scheduling both the Verification Visit and the exam can be overwhelming with a variety of challenges coming up, and it can be hard to get help from the Council to address the challenges. Having a dedicated support person to help navigate these processes would be beneficial. Non-English-speaking CDAs, in particular, want to see this idea prioritized. PD Specialists talked about the need for improved communication with the Council, acknowledging that support coaches could help improve communication challenges by having a specific person to direct questions to.

In addition to the logistical support, PD Specialists said it would be helpful for support coaches to help candidates prepare for the exam by making sure they understand questions and scenarios in practice exams. They could also help prepare candidates with the technical aspects, making sure they understand how to navigate the exam technology.

### Concerns

PD Specialists expressed some concern about having too many people involved in the process. Some felt that candidates would be less likely to reach out to a support coach because they would prefer to communicate with their PD Specialist. This concern seemed to be based on the assumption that candidates know their PD Specialists better and would therefore trust them with their questions more so than an unknown support coach.

### Considerations

CDAs, especially from the Arabic-speaking groups, expressed that, for successful implementation of the support coach role, the support coach model, and the individuals who fill this role, must be culturally sensitive. PD Specialists think this role could be beneficial but are most interested in having support coaches available to them to provide support for questions and resources.

It is important there is clear delineation of roles between support coach and PD Specialist, both for the candidates and PD Specialists. Candidates will need to understand who to approach when questions or

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issues arise. PD Specialists will need to understand when it is their role to answer questions and when to redirect to a support coach.

CDA groups with highest levels of education indicated support coaches could be valuable to many candidates, but if they had to choose, they would prioritize virtual visits over this idea.

### Communication App

The Council proposed the development of a communication app for candidates to communicate directly with PD Specialists to coordinate the Verification Visit, and for PD Specialists to have a tool to communicate directly with Council staff. Participants were asked:

- What would make an app useful
- Whether this kind of app is necessary and if they would use it
- Whether there are better ways for real-time communication with the Council and between candidates and PD Specialists

### Benefits

CDAs across various groups said an app would be valuable if PD Specialists upload their availability so it can be used for scheduling. There were CDAs within each group across different education levels that see the benefit of an app to more easily reach out to a PD Specialist or have contact with more than one PD Specialist as they try to coordinate and schedule a Verification Visit. Some CDAs, particularly in the High School/GED group, said they had challenges connecting with their PD Specialist, and did not get any information from them ahead of the visit, so if an app helped to make sure a PD Specialist responded to messages from a candidate, it would be helpful.

### Concerns

Many CDAs, especially in the non-English speaking groups (both Spanish and Arabic) do not feel an app like this is necessary because they can reach a PD Specialist by phone, if necessary. Additionally, many candidates and PD Specialists use WhatsApp to communicate with one another and find that to be a helpful resource. They do not want another system to sign into, so using an existing app is preferable.

PD Specialists did not like this idea because they do not want another application to have to track. They, too, find it easier to use texting and/or WhatsApp.

### Considerations

Some candidates articulated that, if the Council developed an app for CDA candidates, it might be useful if they could connect with other candidates in the process to communicate about challenges, ideas, etc.

### Exam Preparation (Videos, Practice Tests)

The Council proposed developing resources to better help candidates prepare to take the exam, including walkthrough videos of the testing site, and/or a video of the remote process, as well as practice tests that mirror the actual exam to help candidates identify gaps and challenges in their preparation. CDA participants were asked:

- How they feel about these various preparation materials and resources.

### *Benefits*

CDAs from all groups responded positively to the exam preparation resources being proposed. Non-English-speaking CDAs like the idea of videos, in particular, because visualizations are helpful to comprehend the information. Practice tests were widely liked by all groups and regarded as a top priority for many CDAs. Most CDAs acknowledged that videos would be helpful for those with test anxiety; there were also many who articulated they did not need these.

### *Considerations*

The one concern that arose about the exam preparation resources was whether the cost of preparation materials would fall on candidates and, thus, become a barrier.

### *Exam Experience (Extended Time, Remote Option)*

The Council proposed introducing a remote proctored exam option, as well as extending the amount of time for candidates to take the exam. Participants were asked:

- If they think incorporating remote exam options will improve the overall process for applicants
- If they think allowing extended exam time will positively impact applicants' experiences and completion of the process
- If they think that simplifying language and instructions for the exam is a useful tool for being more inclusive to all applicants

### *Benefits*

CDAs responded overwhelmingly positively to both options of extending the exam time and offering a remote option. CDAs talked about the challenges of finding testing sites near them and the burden of traveling long distances to take the exam and discussed the remote option alleviating these challenges. Regarding extended time, CDAs noted that taking the test causes anxiety for many, and that having more time could reduce the stress many feel of having to complete all the questions in a short period. They noted there does not seem to be a downside of doing either, and these are solutions that could reduce anxiety significantly and make the exam process more equitable. Additionally, they overwhelmingly agreed that simplifying the language of the exams would be beneficial, particularly if that will make the exam more accessible to those who have had trouble passing it.

### *Concerns*

While everyone agreed that a remote exam option would be preferable for many, there were some CDAs who raised concerns about the integrity of the exam. They want to be sure there are mechanisms in place (e.g., proctors) to prevent cheating so the exam is a true demonstration of an individual's knowledge.

### *Considerations*

Non-English-speaking CDAs like the remote option, as long as there is proper translation offered for all candidates.

## Recommendations

Based on the feedback heard during the focus groups, as well as considerations of the needs illuminated through the previous analysis of experiences, BCT recommends the Council prioritize pursuing the following ideas:

- **Electronic Portfolio:** This idea was well received by members of all groups. CDAs, PD Specialists, and partners believe this idea could improve the credentialing process significantly for many candidates, while also improving the PD Specialist review process.
- **Application Enhancements:** Focus group participants across all groups widely approved of the ideas to enhance the application. Given the feedback from many CDAs and applicants that the current application presents challenges, creating a user-friendly application experience that presents information in simple and visual ways will likely reduce significant barriers for many applicants to earning their credential.
- **Chatbots:** While there is some skepticism about the usefulness of an artificial intelligence chatbot answering questions, the primary frustration articulated by CDAs, PD Specialists, and other stakeholders has been challenges communicating with the Council. Chatbots integrated into a communication pipeline could help streamline communication processes, allowing candidates, PD Specialists, and other stakeholders to find information they need and be able to reach Council staff when necessary.
- **Verification Visit Alternatives:** It is in the Council's interest to implement at least one alternative to the current verification visit process, and therefore BCT recommends pursuing further research and analysis into both simulations and options for providing additional forms of evidence.
  - **Simulation Verification Visits:** One of the Council's primary challenges in recent years, since the start of the pandemic, particularly, has been meeting the demand for Verification Visits. CDAs, particularly those who have been through the credentialing process in recent years, feel strongly that there should be alternative options to demonstrate competencies virtually with a more efficient logistical process. Additionally, while a simulation would not capture the particularities of an individual's work environment, it might help make the verification process more equitable by having all candidates demonstrate competencies in the same, or similar, environment.
  - **Additional Forms of Evidence:** Similar to the rationale for pursuing simulations, the option of having candidates provide additional forms of evidence could help reduce the strains in the process and obstacles to earning a CDA credential for many candidates. The advantage to this option is that it could allow candidates to demonstrate their competencies in various ways, as well as capture themselves in their actual work environments. Additionally, there could be an opportunity to leverage the same technology as an electronic portfolio or find ways to link the parts of the process, if desired.
- **Auto-Assign PD Specialist:** This idea was received with mixed responses by candidates and PD Specialists but would most likely make the PD Specialist matching process more efficient and simplified for both candidates and PD Specialists. The concerns about this idea can be mitigated

by including selection criteria that would match a PD Specialist to a candidates based on more characteristics than just geography.

- **Support Coach:** Most CDAs were enthusiastic about the introduction of support coaches to the credentialing process. This role would help address some of the most significant pain points many candidates (and PD Specialists) experience, including scheduling visits, scheduling exams, and challenges with communication. Designated support coaches to whom candidates can direct questions would likely improve communication frustrations. Further, support coaches who are tracking and proactively communicating with candidates in the process, particularly those experiencing challenges, stuck at a particular point, or likely to need support based on contextual factors, could improve the experience and likelihood of completing the credentialing process for many candidates.
- **Exam Preparation Videos & Practice Exams:** For some segments of the candidates, the anxiety related to the exam proved to be the biggest hurdle to earning their CDA. CDAs across all groups were excited about the introduction of practice exams to help prepare to take the test. Videos to prepare for the process could be a valuable, and relatively simple tool to assist some of the candidates for whom the exam creates the largest barriers.
- **Remote Exams:** Not only does the exam create anxiety for many candidates, but there are also significant logistical challenges for many candidates to get to the exam. Introducing a remote exam option could help address challenges related to finding a testing site for those who might live far from one and/or do not have reliable transportation. Additionally, remote exams have become increasingly common and could be a feasible solution for the Council to offer to address a significant barrier for many.
- **Extended Time on Exams:** The time limit of the exam is one factor that creates anxiety for many candidates. The Council has also articulated that the time limit does not necessarily help assess whether a candidate knows the material and should earn their credential. Offering more time on the exam would reduce barriers for candidates who might, in turn, be more likely to succeed in earning their credential.

## Research and Analysis of Options

Given the recommendations above, BCT Partners conducted a thorough process to identify software suggestions for chatbots, learning management systems (LMS), and an ePortfolio. The Council provided basic goals and objectives in mind for their needs, which included supporting the CDA credentialing process and meeting the unique and specialized requirements of the early childhood education field.

### Objectives

The first step in this process was to define the basic requirements necessary for a credentialing system. Through the focus groups, BCT gathered information from applicants, PD Specialists, and partner organizations to help identify specific features and functionality needed to support the CDA credentialing process. This included tracking and documenting professional development hours, managing and submitting application materials, and providing resources and support for applicants.



After gathering and refining the requirements, the next step was to evaluate the different software options available and determine whether an off-the-shelf system or a custom-built system would best meet the organization's needs. In the next phase of this effort, additional requirements will need to be gathered and refined to further guide any development of software purchase for CDA credentialing process to meet the unique and specialized requirements of the early childhood education field.

BCT Partners presents learning management system (LMS) solutions to the Council to use in their credentialing services because it provides the ability to deliver, manage, and track training and professional development programs for their candidates. An LMS would provide the Council the following benefits:

- **Online course delivery:** The Council can use an LMS to deliver training and professional development programs online, making it more convenient and accessible for early childhood educators to access the courses from anywhere and at any time.
- **Tracking and reporting:** An LMS allows the Council to track and report on learners' progress and performance, which can be used to measure the effectiveness of training and to identify areas where additional support or resources may be needed. With the advent of Support Coaches, an LMS could be a system in which support coaches are assigned to candidates to track and monitor their progress.
- **Credential management:** An LMS can be integrated with other software to automate the process of credential management, such as tracking the status of credential applications, renewals, and expiration, ensuring compliance with the standards.
- **Integration with other tools:** An LMS can be integrated with other tools, such as video conferencing and assessment software, which can be used to provide a more robust and interactive learning experience for early childhood educators.
- **E-portfolio:** An LMS can also provide a platform for educators to store and share their professional development activities, which can be used as evidence of their ongoing professional growth and help them in renewing their credentials.

Overall, an LMS can provide the Council a comprehensive solution for delivering, managing, and tracking training and professional development programs, and can be integrated with other software to provide a robust and efficient platform for credentialing services.

### Considerations

There are several factors to be considered in selecting or designing software to meeting your organization's specific needs and functions. The following is a summary of primary considerations.

- **Security:** Ensuring that the software is secure is critical, as a security breach could compromise sensitive data or disrupt business operations.
- **Accessibility:** It's important to consider how the software will be accessed and used by different users, including those with disabilities.
- **Cost:** The cost of developing custom software can vary significantly depending on the complexity of the solution and the resources required.

- **Maintenance:** Custom software will require ongoing maintenance and updates to ensure that it remains functional and secure.
- **Integration:** If the software will need to integrate with other systems or applications, this will need to be considered during the development process.
- **User experience:** Ensuring that the software is easy to use and intuitive is important for user adoption and satisfaction.
- **Scalability:** It's important to consider how the software will scale as the business grows and evolves.
- **Data management:** Ensuring that the software is able to handle and manage data effectively is critical for its functionality and performance.
- **Testing:** Thorough testing is essential to ensure that the software is reliable and performs as expected.
- **Support:** Providing ongoing support for the software will be important for addressing any issues or concerns that may arise.

### Market Analysis

The market landscape for learning management systems (LMS), chatbots, and electronic portfolios is growing rapidly. In terms of LMS, some popular options include Blackboard, Canvas, and Totara. These systems typically offer features such as course management, assignment submission, and grade tracking. Additionally, many LMS also include tools for communication and collaboration, such as discussion boards and group work spaces.

As for chatbots, some popular options include Aivo, PandoraBots, and Boost.ai. These systems generally offer features such as automated customer service, lead generation, and personalized communication. Additionally, many chatbots are able to integrate with other platforms, such as CRM and LMS systems.

In terms of electronic portfolios, some popular options include Pathbrite, PebblePad and Portfolium. These systems typically offer features that allow users to organize accomplishments and experiences into a portfolio of work by adding digital documents including certifications. Additionally, many electronic portfolio systems provide a framework to help users save records of learning, achievement, and goal tracking.

Overall, the market for these products is constantly changing and evolving, with new systems and features being developed all the time. It's important for customers to carefully research and evaluate different options before making a decision, in order to find the best fit for their needs.

### Commercial Off-the-Shelf (COTS) Systems

Once the requirements have been defined, the next step is to evaluate off-the-shelf System solutions that meet those requirements. This includes researching and comparing different solutions to determine which one best fits the needs of the Council. This step should also include a review of the vendor's experience and reputation in the industry, as well as a review of customer references and testimonials.

The following table summarizes advantages and disadvantages to using Commercial Off the Shelf Systems.



<b>Commercial Off the Shelf (COTS) Systems</b>	
<i>Advantages</i>	<i>Disadvantages</i>
<p><b>Cost:</b> Off-the-shelf systems are typically less costly to purchase and implement than custom systems.</p> <p><b>Time:</b> Off-the-shelf systems are usually ready to use out of the box, which means they can be implemented more quickly than custom systems.</p> <p><b>Support:</b> Off-the-shelf systems often come with support from the vendor, which can be helpful for troubleshooting and maintenance.</p> <p><b>Features:</b> Off-the-shelf systems typically offer a wide range of features and functionality, which can make them suitable for a variety of learning contexts. Often, feature requests can be made to vendors, who may develop and upgrade the system without incurring additional costs.</p> <p><b>Proven technology:</b> Off-the-shelf systems have been tested and proven in a variety of settings, so you can be confident that the technology is reliable and effective.</p> <p><b>User Experience:</b> Most off-the-shelf systems are designed with user-friendliness in mind, making it easy for learners and trainers to use the system.</p>	<p><b>Flexibility:</b> Off-the-shelf systems are generally not as customizable as a custom system, which means that you may have to work within the constraints of the system rather than being able to tailor it specifically to your needs.</p> <p><b>Integration:</b> Off-the-shelf systems may not integrate seamlessly with other systems or tools that the organization uses, such as HR or CRM systems.</p> <p><b>Ongoing fees:</b> Most off-the-shelf systems require ongoing fees for things like support, updates, and maintenance, which can add up over time.</p> <p><b>Lack of control:</b> With an off-the-shelf system, you are reliant on the vendor for updates, maintenance, and support, which means that you may not have as much control over the system as you would with a custom system.</p> <p><b>Scalability:</b> Off-the-shelf systems may not scale well as the organization grows, requiring additional licenses or upgrades to accommodate more users or features.</p>

### Custom System

In addition to considering advantages and disadvantages to a commercial off the shelf system, it valuable to consider the advantages and disadvantages of design and developing a custom system.

For a custom system of this nature, a human-centered design approach is ideal. Human-centered design methodology focuses on understanding the needs and wants of the end-users of a product or service. When developing a custom software solution using this approach, it may require an extended timeframe to complete because the process involves extensive research, testing, and iteration.

The process typically begins with conducting user research to understand the needs, behaviors, and motivations of the end-users. This research is used to identify pain points and opportunities for improvement in the current system, and to develop a set of user requirements for the new software.

Next, multiple design concepts and prototypes are created that address user requirements. These concepts and prototypes are then tested with users to gather feedback and identify areas for improvement. Based on the feedback, the design team iterates on the design, refining and testing it until it meets the needs of the end-users.

The following table summarizes advantages and disadvantages of developing a custom system.



Custom System	
<i>Advantages</i>	<i>Disadvantages</i>
<p><b>Customization:</b> A custom system can be tailored to meet the specific needs and preferences of the organization, providing greater flexibility and control.</p> <p><b>Control:</b> With a custom system, you have full control over the system and can make any changes or updates that you see fit.</p> <p><b>Integration:</b> A custom system can be designed to integrate seamlessly with other systems and tools used by the organization.</p> <p><b>Scalability:</b> A custom system can be built to scale as the organization grows, eliminating the need for additional licenses or upgrades.</p>	<p><b>Cost:</b> Building a custom system can be more expensive than purchasing a COTS system, due to the high upfront cost of development and ongoing maintenance.</p> <p><b>Time:</b> Developing a custom system can take longer than implementing an off-the-shelf system, due to the design and development process. The entire process can be time-consuming, as it may require multiple rounds of research, testing, and iteration before a final design is reached. Additionally, the process may require collaboration with multiple resources, such as internal and external stakeholders, developers, and subject matter experts.</p> <p><b>Support:</b> Custom systems may not come with vendor support, meaning the organization will need to rely on in-house resources or third-party support for maintenance and troubleshooting.</p>

### Recommendation

Ultimately, the decision to use an off-the-shelf solution or develop a custom system will depend on the Council's specific needs, requirements, and budget. If rapid implementation and budget considerations are a priority, an off-the-shelf solution may be the right choice. If it is determined that a highly customized system is preferred and the Council are willing to invest the time and money necessary to develop it, a custom solution may be a better fit.

The following table compares commercial off the shelf software to custom software based on the key factors to consider (listed above).

Criteria	Commercial Off-the-shelf Software	Custom Software
Security	May have built-in security features	Can be tailored to specific security needs
Accessibility	Accessibility concerns addressed by vendor	Additional considerations must be taken to ensure accessibility requirements are met



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Cost	Typically lower upfront cost	May have higher development costs, but lower long-term costs
Maintenance	Vendor typically handles updates and maintenance	In-house team responsible for updates and maintenance
Integration	May integrate easily with other off-the-shelf software	Can be tailored to integrate with specific systems
User experience	May have a generic user interface or functions not useful to a user	Can be designed for optimal user experience
Scalability	May be limited in scalability options	Can be designed to scale as needed
Data management	May have limited data management options	Can be tailored for specific data management needs
Testing	May have limited testing options	Can be thoroughly tested for specific use cases
Support	Vendor support typically available	In-house team responsible for support

## System Comparisons

In addition to general considerations to guide decision making about whether to use a commercial off the shelf software system or develop a customized software system, BCT has done research on specific COTS options. The following tables provide information about possible systems the Council should consider for learning management systems, ePortfolios, virtual simulators, and chatbots. While these lists are not exhaustive, they provide information about specific systems that might meet the Council's needs, along with the availability of relevant features.

Learning Management Systems			
Company Name:	Blackboard	Canvas	Totara
Website:	<a href="http://www.blackboard.com">www.blackboard.com</a>	<a href="http://www.instructure.com/canvas">www.instructure.com/canvas</a>	<a href="http://www.totara.com">www.totara.com</a>
From the developer	A learning management system (LMS) used by educational institutions and businesses to deliver and manage online courses and training programs.	An LMS that provides a simple, user-friendly interface and a wide range of tools for creating and delivering online content.	An open-source LMS that is built on top of Moodle, a popular open-source LMS, and is designed for use by businesses and organizations.
Relevant features			
Customization options	Yes	Yes	Yes
Mobile compatibility	Yes	Yes	Yes
Integrations	Yes	Yes	Yes
Analytics and Reporting	Yes	Yes	Yes
Video Conferencing	Yes	Yes	Yes
Accessibility	Yes	Yes	Yes
Support	Yes	Yes	Yes
SCORM Compliant	Yes	Yes	Yes



ePortfolio				
Company Name:	Canvas Credentials	Pathbrite	PebblePad	PortfolioGen
Website:	<a href="https://www.instructure.com/en-gb/schools/products/canvas/canvas-credentials-digital-badges">https://www.instructure.com/en-gb/schools/products/canvas/canvas-credentials-digital-badges</a>	<a href="http://www.pathbrite.com">www.pathbrite.com</a>	<a href="http://www.pebblepad.co.uk">www.pebblepad.co.uk</a>	<a href="http://www.portfoliogen.com">www.portfoliogen.com</a>
Description from the developer	Ensure your educators have the skills and credentials needed to produce the best outcomes for students in your school. Start tracking skills and certifications, supporting professional development, and evaluating progress today.	Pathbrite is an easy way for people to showcase their abilities and achievements via beautiful and compelling portfolios. Pathbrite allows you to go over and beyond with your digital portfolio, away from the traditional one-dimensional presentations. It works for other documents such as job applications, resumes, or academic presentations. It allows you to break free and express yourself in your submissions; create	PebblePad is designed to act as an electronic portfolio (e-portfolio). It is a Personal Learning Space used in diverse learning contexts such as schools, colleges, universities, and professional bodies. It is useful for students, teachers, and testers for personal development planning; continuing professional development; and learning, teaching, and assessment. PebblePad was created with everything set to revolve around the student. It provides a framework to help users save records of learning, achievement, and goals. It also has a reflective structure underlining all its core elements.	PortfolioGen gives professionals, teachers, students and educators the tools needed to highlight and demonstrate their skills in a modern and unique way that goes beyond traditional binders.  Developed by teachers, PortfolioGen makes it easy to create a customized online portfolio to showcase and share your skills, education, work experience and achievements, while providing an opportunity for reflection and continued professional growth.



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		and edit your digital portfolios to reflect your achievements, learning, and studies.		
<b>Relevant features</b>				
Cloud-based platform	Yes	Yes	Yes	Yes
Mobile app availability	Yes	Yes	Yes	No
Customizable templates	Yes	Yes	Yes	Yes
Multimedia support	Yes	Yes	Yes	Yes
Collaboration and sharing capabilities	Yes	Yes	Yes	Yes
Analytics and tracking	Yes	Yes	Yes	Yes
Integration with LMS	Yes	Yes	Yes	Yes
Accessibility features	Yes	Yes	Yes	Yes

Virtual Simulators					
Company Name:	Simula8	Simio	Vensim	Arena	FlexSim
Website:	<a href="http://www.simul8.com">www.simul8.com</a>	<a href="http://www.simio.com">www.simio.com</a>	<a href="http://www.vensim.com">www.vensim.com</a>	<a href="http://www.rockwellautomation.com">www.rockwellautomation.com</a>	<a href="http://www.flexsim.com">www.flexsim.com</a>
Description from the developer	Simul8 is the most intuitive and fastest simulation engine on the market. Before Simul8, simulation software was costly, resource-hungry and time-intensive, Simul8 makes simulation accessible to all.	Simulation and scheduling solution designed to help businesses assess, predict and manage processes with designing, planning, optimization and other tools.	Analysts and researchers with hard problems to solve in business, public policy and academia.	Designed for businesses of all sizes in manufacturing, supply chain, healthcare, mining, and other industries, it is a simulation tool that provides agent-based modeling, reporting, and more.	FlexSim was designed to make simulation modeling and analysis easier and more powerful for engineers and decision makers in manufacturing, warehousing, supply chain, logistics, and healthcare.
Relevant Features					
3D Imaging	Yes	Yes	No	Yes	Yes
Agent-Based Modeling	Yes	Yes	No	Yes	Yes
Continuous Modeling	Yes	Yes	Yes	Yes	Yes
Design Analysis	Yes	Yes	No	Yes	Yes
Direct Manipulation	Yes	Yes	No	Yes	Yes
Discrete Event Modeling	Yes	Yes	No	Yes	Yes
Dynamic Modeling	Yes	Yes	Yes	Yes	Yes
Graphical Data Presentation	Yes	Yes	No	Yes	Yes
Industry Specific Database	Yes	Yes	No	Yes	Yes

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Monte Carlo Simulation	Yes	Yes	Yes	Yes	Yes
Motion Modeling	Yes	No	No	Yes	No
Presentation Tools	Yes	Yes	No	Yes	Yes
Stochastic Modeling	Yes	No	Yes	Yes	No
Turbulence Modeling	No	No	No	No	No
<b>Support</b>					
Email/Help Desk	Yes	Yes	Yes	No	Yes
FAQs/Forum	Yes	Yes	Yes	No	Yes
Knowledge Base	Yes	No	No	No	Yes
Phone Support	Yes	Yes	Yes	No	Yes
24/7 (Live Rep)	No	Yes	Yes	Yes	No
Chat	Yes	No	Yes	No	Yes
<b>Training</b>	Yes	Yes	Yes	Yes	Yes
In Person	Yes	Yes	Yes	Yes	Yes
Live Online	Yes	Yes	Yes	Yes	Yes
Webinars	Yes	Yes	No	Yes	No
Documentation	Yes	Yes	Yes	Yes	Yes
Videos	Yes	No	No	No	Yes

Chatbots			
Company Name:	Aivo	PandoraBots	Boost.AI
Website:	<a href="http://www.aivo.co">www.aivo.co</a>	<a href="http://www.pandorabots.com">www.pandorabots.com</a>	<a href="http://www.boost.ai">www.boost.ai</a>
Description from the developer	Aivo's Conversational AI-powered suite understands natural conversations, connects to your tech stack, and delivers clients exactly what they're looking for.	Our robust, feature-rich, self-service IDE empowers IT teams to build internally, enabling end-to-end management and ownership of your codebase and customer data. Professional Services, including custom chatbot development, are also available for Enterprises via our internal team or network of third-party PS Implementation Partners.	Probably the world's most intuitive software for managing virtual agents. Design delightful interactions. Integrate them with existing solutions. Train the virtual agent's AI to automate them. Do it all without coding.
Relevant Features			
AI/Machine Learning	Yes	Yes	Yes
Augmented Analytics	Yes	Yes	No
Automated Responses	Yes	Yes	No
Automated Routing	No	Yes	No
Chatbot	Yes	Yes	Yes
Code-free Development	Yes	No	Yes
Customer Support	Yes	Yes	No
Customizable Branding	N/A	N/A	Yes
For Sales/Marketing	Yes	Yes	No
Language Detection	Yes	Yes	No
Natural Language Processing	Yes	Yes	Yes
Pre-Configured Bot	Yes	Yes	Yes
Query Suggestions	Yes	Yes	No
Transfers/Routing	Yes	Yes	No



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Virtual Assistant	Yes	Yes	No
Multi-lingual	Yes	Yes	Yes

## Appendix A BCT PARTNERS: Focus Group Protocol- CANDIDATES

Strategy: Conduct a 90-minute focus group for the Council for Professional Recognition to learn about attitudes and responses to proposed changes in the CDA process.

### **FOCUS GROUP Interview Guide**

Thank you for offering your time and insights today, my name is [XXX] and I work at BCT Partners. BCT Partners is one of the top 100 largest Black-owned enterprises in the U.S. We have been nationally recognized by Forbes as one of the nation's top 200 management consulting firms and by Manage HR magazine as one of the top 10 DEI firms in the U.S. The Council for Professional Recognition has asked BCT to help them to be more successful in understanding responses and attitudes towards proposed changes to the CDA credentialing process. Today we hope to enlist your help to better understand how to build a better experience for every applicant involved in this process.

As individuals who have undergone the credentialing process, you have a unique perspective that could help the Council for Professional Recognition achieve these goals and work towards improvement of the CDA process. You were invited to participate in this confidential focus group to share your direct and candid feedback about your thoughts on the proposed changes and how they will impact the process overall.

Today, I will share with you the ideas the Council is considering to improve the credentialing process experience for all applicants. These ideas were generated after an intensive review and analysis of data from 1) the Council's administrative system, 2) surveys of CDAs, PD Specialists, applicants who did not complete the process, and other stakeholders, 3) and focus groups and interviews with a wide range of applicants, PD Specialists, and other stakeholders.

I will ask you to share your perceptions of the proposed ideas, and how you think they might improve the credentialing process for future applicants. Some of these questions will be tailored to various parts of the CDA credentialing process while others may focus more generally on the applicant experience as a whole. Your responses will be confidential and will only be shared in aggregate, so please be as candid and forthcoming as you can. There will be no penalty or repercussions for what you share in this interview. Our final report will only provide summaries and anecdotes from what was learned.

This means:

- (1) You can decline to answer any questions or leave at any time
- (2) We will not connect your name with what was said in any written reports

Before we begin, the Council has asked that anyone participating in a focus group sign a Non-Disclosure Agreement. This is because we are still in the phase of gathering feedback, and we do not want to create confusion across the CDA network of people thinking the process is changing in ways that it might not be. Please take a moment to review the NDA document, sign it, and send it to [aalfred@bctpartners.com](mailto:aalfred@bctpartners.com) [put in chat].

I would like to let you know that we'll be recording this call. The recording is for note taking purposes only and will not be shared anyone outside this research team. Please confirm that you consent to being recorded.

START RECORDING.

### **Training**



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## COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA PROCESS REPORT

We received a lot of feedback from candidates about the range of training quality they received while preparing for the CDA. Given this, the ideas the Council generated were to standardize trainings, particularly by requiring that any training program accepted by the Council to use specific resources (e.g., Essentials).

1. Do you think it's useful to create universal standards for training that include requiring specific resources to be used by trainers?
2. Are there any barriers or obstacles you think this change would create? Are there any other concerns you might have about implementing these changes?
3. Is there anything that excites you about it?

*[Facilitator Note: the training we're referring to relates to the 120 hours in the event people have questions about the word training]*

### **Portfolio**

We saw in the data that it's crucial to have a portfolio assessment that allows candidates to demonstrate competencies. We also learned it is important to include perspectives of people who can speak to the candidate's competencies in the credentialing process, and that the reflective process is key to the success of many candidates. Additionally, we heard from PD Specialists that the review process of the portfolio can be challenging with a physical portfolio. Given all of this, the ideas the Council generated were: 1) Create an electronic portfolio option for candidates to select that would allow candidates to have a more interactive portfolio experience and include inputs from more people who can attest to their competencies; 2) Incorporate a reflective aspect of the portfolio to help candidates think deeply about their own practice; 3) Re-introduce the advisor role to support individuals in the process of preparing to apply for their CDA.

*[Facilitator notes: If there are questions about the advisor role, you can explain this would be a mentor for the applicant before applying, while preparing for the CDA process. This would likely be someone completely outside the Council who can provide an individual with guidance and support as they're preparing for the credentialing process. In the past, this was someone in the individual's community that they identified. The advisor could be like that again or could include virtual advisors from the CDA network in other communities. The electronic portfolio option would not be required, but something candidates could select if they want to.]*

4. What do you think about having the option of an electronic portfolio that could be interactive?
5. Do you think allowing more input from more people will be helpful to this process?
6. Would you find it helpful to incorporate more reflective aspects of the credentialing process (this includes creating a space to think deeply about personal practices)?
7. An electronic portfolio would likely involve a free login to a site separate from your registration and application. What do you see as advantages or disadvantages to this?



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8. What are some important considerations for the advisor role to make it valuable for potential CDA applicants? (For example, location? Availability? Experience? Access? Process to identify someone?)
9. What concerns, if any, do you have about finding an advisor? Would an advisor need to be someone in an individual's community, or could they be elsewhere and support someone virtually?

### **Application**

We learned in the data and feedback that ease of application is an essential component to earning the credential. Many candidates articulated challenges with the application, including finding it confusing and cumbersome. Additionally, they found that it was challenging to get support with application related questions, including where they are in the process and what to do next. To address these challenges, the Council generated the following ideas: 1) Build in video instructions and description of the full credentialing process; 2) Simplify language and instructions in the application; 3) Use graphic/visual representation to show applicants where they are in the process 4) Introduce chatbots to answer commonly asked questions immediately (24/7).

10. What do you think of each of these ideas?
11. Do you think these changes to the application would help individuals navigate the process more easily?
12. Is there anything the Council should consider if they make any of these changes?

### **Verification Visit**

We heard that there is an increased need for virtual visit options, and that there are frequent challenges with finding a PD Specialist and scheduling Verification Visits. Given all of this, the Council has generated the following ideas: 1) Explore the use of classroom simulations to collect evidence of candidates' competencies as an option; 2) Include videos, diary entries, and other forms of submission to provide additional evidence of competencies; 3) Introduce an app for candidates to communicate with a PD Specialist; 4) Introduce an option for a candidate to work with a support coach for scheduling help with verification visit; 5) Auto-assign a PD Specialist to a candidate, or provide a list of several PD Specialists in the area for a candidate to contact; 6) Have access to chatbots for frequently asked questions to be answered immediately at any time. Additionally, the Council has already made virtual Verification Visits a permanent option.

*[Facilitator Notes: 1) A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the Verification Visit, specifically, a support coach could help an applicant navigate challenges related to scheduling and finding a PD Specialist.*

*[Facilitator notes: 2) There might be questions and concerns related to the simulation idea; remind participants this group is intended to collect feedback about the ideas and understand perceptions and concerns, as well as identify which ideas should be made a reality. We want to understand their thoughts about it, what would make it work and what concerns them. Mentioning it does not mean it is definitely happening. The following can be used as an example of what this process would look like: The Council would create an online virtual classroom where the teacher is presented with several scenarios using*



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*avatars. They would move through the program, which documents the decisions the candidate makes according to the items on the CSI (Comprehensive Scoring Instrument). A score is then automatically generated.]*

13. What do you think about the idea of expanding how the Council does virtual Verification Visits? (This includes having more simulations and additional ways to provide evidence of competency.)

14. Do you foresee any challenges in allowing applicants to show competency in different ways? What kinds of complications come to mind? Is there any method you can think of that you think would be well-received or used most often? Why?

15. If there was an app for communication, what would make it useful?

16. What would make a support coach valuable for helping someone through the Verification Visit process?

**Exam**

We found that the exam experience created barriers for applicants. Timed testing creates anxiety for many applicants. Many folks also have challenges accessing testing sites, both because of location and transportation barriers, and because many testing sites are perceived as intimidating and uninviting, impacting candidates' performance. The Council has generated the following ideas to address these barriers: 1) Introduce a remote exam option; 2) Extend the amount of time for candidates to take the exam; 3) Offer preparation for the exam experience, including walk through videos of the testing site, video of the remote process; 4) Offer practice tests that mirror the actual exam to help candidates identify gaps and challenges in their preparation; 5) Offer option to work with a support coach to help schedule the exam; 6) Have access to chatbots for frequently asked questions to be answered immediately at any time.

*[Facilitator Note: A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the exam, specifically, a support coach could help an applicant navigate challenges related to scheduling, finding a testing site, and figuring out the remote exam process.]*

17. Do you think incorporating remote exam options will improve the overall process for applicants?

18. Do you think allowing extended exam time will positively impact applicants' experiences and completion of the process?

19. Do you feel that simplifying language and instructions for the exam is a useful tool for being more inclusive to all applicants?

20. How do you feel about including preparation materials for the exam such as practice tests, providing virtual walk-throughs of testing sites, and videos with explanations of the remote process?



21. What would make a support coach valuable for helping someone through the exam process?

**General Questions**

22. If you had to choose just three of the above-mentioned ideas to bring to life, which would they be?

23. Do you think adding chatbots to answer commonly asked questions alongside other digital tools, and/or support coaches, would help alleviate most of the communication issues throughout the process? What would make these tools most helpful?

24. Do you see any major difficulties or obstacles to improvement with these proposed changes? Are there any logistical or individual concerns or issues that you think may have been overlooked?

## Appendix B BCT PARTNERS: Focus Group Protocol- PD Specialist

Strategy: Conduct a 90-minute focus group for the Council for Professional Recognition to learn about attitudes and responses to proposed changes in the CDA process.

### **FOCUS GROUP Interview Guide**

Thank you for offering your time and insights today, my name is [XXX] and I work at BCT Partners. BCT Partners is one of the top 100 largest Black-owned enterprises in the U.S. We have been nationally recognized by Forbes as one of the nation's top 200 management consulting firms and by Manage HR magazine as one of the top 10 DEI firms in the U.S. The Council for Professional Recognition (the Council) has asked BCT to help them to be more successful in understanding responses and attitudes towards proposed changes to the CDA credentialing process. Today we hope to enlist your help to better understand how to build a better experience for every applicant involved in this process.

As PD Specialists who have been part of the credentialing process, you have a unique perspective that could help the Council achieve these goals and work towards improvement of the CDA process. You were invited to participate in this confidential focus group to share your direct and candid feedback about your thoughts on the proposed changes and how they will impact the process overall.

Today, I will share with you the ideas the Council is considering to improve the credentialing process experience for all applicants. These ideas were generated after an intensive review and analysis of data from 1) the Council's administrative system; 2) surveys of CDAs, PD Specialists, applicants who did not complete the process, and other stakeholders; and 3) focus groups and interviews with a wide range of applicants, PD Specialists, and other stakeholders.

I will ask you to share your perceptions of the proposed ideas, and how you think they might improve the credentialing process for future applicants. Some of these questions will be tailored to various parts of the CDA credentialing process while others may focus more generally on the credential experience as a whole. Your responses will be confidential and will only be shared in aggregate, so please be as candid and forthcoming as you can. There will be no penalty or repercussions for what you share in this interview. Our final report will only provide summaries and anecdotes from what was learned.

This means:

- (1) You can decline to answer any questions or leave at any time
- (2) We will not connect your name with what was said in any written reports

Before we begin, I would like to confirm that everyone received the Non-Disclose Agreement I sent yesterday, and has returned it. The Council is asking anyone participating in one of these focus groups to sign it because we are still in the phase of gathering feedback, and we do not want to create confusion across the CDA network of people thinking the process is changing in ways that it might not be. Please take a moment to review the NDA document, sign it, and send it back to me at to [aalfred@bctpartners.com](mailto:aalfred@bctpartners.com).



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I would like to let you know that we'll be recording this call. The recording is for note taking purposes only and will not be shared anyone outside this research team. Please confirm that you consent to being recorded.

[START RECORDING.]

### **Training**

We received a lot of feedback from candidates about the range of training quality they received while preparing for the CDA. (Note this relates to the 120 hours in the event people have questions about the word training.) The ideas the Council generated were to standardize trainings, particularly by requiring that any training program accepted by the Council to use specific resources (e.g., *Essentials*).

1. Do you think it's useful to create universal standards for training that include requiring specific resources to be used by trainers?
2. Are there any barriers or obstacles you think this change would create? Are there any other concerns you might have about implementing these changes?
3. Is there anything that excites you about it?

### **Portfolio**

We saw in the data that it's crucial to have a portfolio assessment that allows candidates to demonstrate competencies. We also learned it is important to include perspectives of people who can speak to the candidate's competencies in the credentialing process, and that the reflective process is key to the success of many candidates. Additionally, we heard from PD Specialists that the review process of the portfolio can be challenging with a physical portfolio. Given all of this, the ideas the Council generated were: 1) Create an electronic portfolio option that would allow candidates to have a more interactive portfolio experience and include inputs from more people who can attest to their competencies; 2) Incorporate a reflective aspect of the portfolio to help candidates think deeply about their own practice; 3) Re-introduce the advisor role to support individuals in the process of preparing to apply for their CDA.

*[Facilitator note: 1) The current idea would give applicants the opportunity to upload a PDF of their portfolio for PD Specialist to review ahead of verification visit should the candidate select to use the electronic format.*

*2) Advisor Role: This would be a mentor for the applicant before applying, while preparing for the CDA process. This would likely be someone completely outside the Council who can provide an individual with guidance and support as they're preparing for the credentialing process. In the past, this was someone in the individual's community that they identified. The advisor could be like that again or could include virtual advisors from the CDA network in other communities.]*

4. What do you think about an electronic portfolio format?
5. How would an electronic portfolio affect the PD Specialist process for reviewing it? What would you envision this looking like? What would make it useful to have an electronic version of the portfolio?



6. Do you think allowing more input from more people will be helpful in verifying a candidate's competencies?
7. Would you find it helpful for the reflective dialogue for candidates to incorporate more reflection in the portfolio process (this includes creating a space to think deeply about personal practices)?
8. How do you think the addition of an advisor might impact the PD Specialist role?

### **Application**

We heard from many people about challenges with the application, including finding it confusing and cumbersome. Additionally, many people reported that it was challenging to get support with application related questions, including where they are in the process and what to do next. To address these challenges, the Council generated the following ideas: 1) Build in video instructions and description of the full credentialing process; 2) Simplify language and instructions in the application; 3) Use graphic/visual representation to show applicants where they are in the process; 4) Introduce chatbots to answer commonly asked questions immediately (24/7).

*[Facilitator note: Application changes would be included in both the candidate application as well as the PD Specialist application]*

9. What do you think of each of these ideas?
10. Do you think these changes to the application would help individuals navigate the process more easily?
11. Is there anything the Council should consider if they make any of these changes?

### **Verification Visit**

The data and surveys showed us that the Verification Visit experience a candidate has with a PD Specialist can vary, and feelings of getting a fair assessment of competencies and having a reflective dialogue that focuses on strengths and areas of growth are keys to success for many candidates. We also heard that there is an increased need for virtual visit options, and that there are frequent challenges with finding a PD Specialist and scheduling Verification Visits. Given all of this, the Council has generated the following ideas: 1) Introduce an app for PD Specialists to communicate directly with candidates and Council staff; 4) Introduce an option for a candidate to work with a support coach for scheduling help with verification visit; 5) Auto-assign a PD Specialist to a candidate, or provide a list of several PD Specialists in the area for a candidate to contact; 6) Real-time note taking input into application/administrative system (e.g., YourCouncil); 7) Have access to chatbots for frequently asked questions to be answered immediately at any time. Additionally, the Council has already made virtual Verification Visits a permanent option.

12. What do you think can help make virtual visits successful?
13. How would you feel about verifying competencies through additional evidence, e.g., videos, diary entries?





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14. If there was an app for communication, what would make it useful? Is it needed? Would you use it? What are the barriers? Is there better way to have real time contact with Council and/or candidates?

15. What would you want a tool to input your notes directly into the administrative system to look like?

16. How could the addition of a support coach help PD Specialists? Are there any challenges you foresee?

**General Questions**

17. If you had to choose just three of the above-mentioned ideas to bring to life, which would they be?

18. Do you think adding chatbots to answer commonly asked questions alongside other digital tools, like a communication app, would help alleviate most of the communication issues throughout the process? How do you envision PD Specialists would use these tools?

19. What major difficulties or obstacles to improvement may exist with these proposed changes? Are there any logistical or individual concerns or issues that you think may have been overlooked?

## Appendix C BCT PARTNERS: Focus Group Protocol- Stakeholders

Strategy: Conduct a 60-minute focus group for the Council for Professional Recognition to learn about attitudes and responses to proposed changes in the CDA process.

### FOCUS GROUP Interview Guide

Thank you for offering your time and insights today, my name is [XXX] and I work at BCT Partners. BCT Partners is one of the top 100 largest Black-owned enterprises in the U.S. We have been nationally recognized by Forbes as one of the nation's top 200 management consulting firms and by Manage HR magazine as one of the top 10 DEI firms in the U.S. The Council for Professional Recognition (the Council) has asked BCT to help them to be more successful in understanding responses and attitudes towards proposed changes to the CDA credentialing process. Today we hope to enlist your help to better understand how to build a better experience for every applicant involved in this process.

As individuals who support people going into the credentialing process, you have a unique perspective that could help the Council achieve these goals and work towards improvement of the CDA process. You were invited to participate in this confidential focus group to share your direct and candid feedback about your thoughts on the proposed changes and how they will impact the process overall.

Today, I will share with you the ideas the Council is considering to improve the credentialing process experience for all applicants. These ideas were generated after an intensive review and analysis of data from 1) the Council's administrative system; 2) surveys of CDAs, PD Specialists, applicants who did not complete the process, and other stakeholders; and 3) focus groups and interviews with a wide range of applicants, PD Specialists, and other stakeholders.

I will ask you to share your perceptions of the proposed ideas, and how you think they might improve the credentialing process for future applicants. Some of these questions will be tailored to various parts of the CDA credentialing process while others may focus more generally on the applicant experience as a whole. Your responses will be confidential and will only be shared in aggregate, so please be as candid and forthcoming as you can. There will be no penalty or repercussions for what you share in this interview. Our final report will only provide summaries and anecdotes from what was learned.

This means:

- (1) You can decline to answer any questions or leave at any time
- (2) We will not connect your name with what was said in any written reports

Before we begin, the Council has asked that anyone participating in a focus group sign a Non-Disclosure Agreement. This is because we are still in the phase of gathering feedback, and we do not want to create confusion across the CDA network of people thinking the process is changing in ways that it might not be. Please take a moment to review the NDA document, sign it, and send it to [aalfred@bctpartners.com](mailto:aalfred@bctpartners.com) [put in chat].

I would like to let you know that we'll be recording this call. The recording is for note taking purposes only and will not be shared anyone outside this research team. Please confirm that you consent to being recorded.

START RECORDING.

### **Training**

We received a lot of feedback from candidates about the range of training quality they received while preparing for the CDA. Given this, the ideas the Council generated were to standardize trainings, particularly by requiring that any training program accepted by the Council to use specific resources (e.g., *Essentials*).

1. Do you think it's useful to create universal standards for training that include requiring specific resources to be used by trainers?
2. What would need to happen to make this transition successful?
3. Are there any barriers or obstacles you think this change would create? Are there any other concerns you might have about implementing these changes?
4. Is there anything that excites you about it?

*[Facilitator Note: the training we're referring to relates to the 120 hours in the event people have questions about the word training.]*

### **Portfolio**

We saw in the data that it's crucial to have a portfolio assessment that allows candidates to demonstrate competencies. We also learned it is important to include perspectives of people who can speak to the candidate's competencies in the credentialing process, and that the reflective process is key to the success of many candidates. Additionally, we heard from PD Specialists that the review process of the portfolio can be challenging with a physical portfolio. Given all of this, the ideas the Council generated were: 1) Create an electronic portfolio option for candidates to select that would allow candidates to have a more interactive portfolio experience and include inputs from more people who can attest to their competencies; 2) Incorporate a reflective aspect of the portfolio to help candidates think deeply about their own practice; 3) Re-introduce the advisor role to support individuals in the process of preparing to apply for their CDA.

*[Facilitator notes: If there are questions about the advisor role, you can explain this would be a mentor for the applicant before applying, while preparing for the CDA process. This would likely be someone completely outside the Council who can provide an individual with guidance and support as they're preparing for the credentialing process. In the past, this was someone in the individual's community that they identified. The advisor could be like that again or could include virtual advisors from the CDA network in other communities.*

*The electronic portfolio option would not be required, but something candidates could select if they want to.]*

5. What do you think about having the option of an electronic portfolio that could be interactive?
6. Do you think allowing more input from more people will be helpful to this process?
7. Do you think adding an electronic portfolio option would change the way you support candidates in their preparation for the credentialing process?



8. What are some important considerations for the advisor role to make it valuable for potential CDA applicants? (For example, location? Availability? Experience? Access? Process to identify someone?)
9. What concerns, if any, do you have (re)introducing an advisor? Would an advisor need to be someone in an individual's community, or could they be elsewhere and support someone virtually?

### **Application**

We learned in the data and feedback that ease of application is an essential component to earning the credential. Many candidates articulated challenges with the application, including finding it confusing and cumbersome. Additionally, they found that it was challenging to get support with application related questions, including where they are in the process and what to do next. To address these challenges, the Council generated the following ideas: 1) Build in video instructions and description of the full credentialing process; 2) Simplify language and instructions in the application; 3) Use graphic/visual representation to show applicants where they are in the process; 4) Introduce chatbots to answer commonly asked questions immediately (24/7).

10. What do you think of each of these ideas?
11. Do you think these changes to the application would help individuals navigate the process more easily?
12. Is there anything the Council should consider if they make any of these changes?

### **Exam**

We found that the exam experience created barriers for applicants. Timed testing creates anxiety for many applicants. Many folks also have challenges accessing testing sites, both because of location and transportation barriers, and because many testing sites are perceived as intimidating and uninviting, impacting candidates' performance. The Council has generated the following ideas to address these barriers: 1) Introduce a remote exam option; 2) Extend the amount of time for candidates to take the exam; 3) Offer preparation for the exam experience, including walk through videos of the testing site, video of the remote process; 4) Offer practice tests that mirror the actual exam to help candidates identify gaps and challenges in their preparation; 5) Offer option to work with a support coach to help schedule the exam 6) Have access to chatbots for frequently asked questions to be answered immediately at any time.

*[Facilitator Note: A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the exam, specifically, a support coach could help an applicant navigate challenges related to scheduling, finding a testing site, figuring out the remote exam process.]*

1. Do you think incorporating remote exam options will improve the overall process for applicants?
2. Do you think allowing extended exam time will positively impact applicants' experiences and completion of the process?



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3. Do you feel that simplifying language and instructions for the exam is a useful tool for being more inclusive to all applicants?
4. How do you feel about including preparation materials for the exam such as practice tests, providing virtual walk-throughs of testing sites, and videos with explanations of the remote process?
5. What would make a support coach valuable for helping someone through the exam process?

### **Verification Visit**

We heard that there is an increased need for virtual visit options, and that there are frequent challenges with finding a PD Specialist and scheduling Verification Visits. Given all of this, the Council has generated the following ideas: 1) Create a simulation of a classroom to demonstrate competencies, rather than doing so in an actual classroom; 2) Include videos, diary entries, and other forms of submission to provide additional evidence of competencies; 3) Introduce an app for candidates to communicate with a PD Specialist; 4) Introduce an option for a candidate to work with a support coach for scheduling help with Verification Visit; 5) Auto-assign a PD Specialist to a candidate, or providing a list of several PD Specialists in the area for a candidate to contact; 6) Have access to chatbots for frequently asked questions to be answered immediately at any time. Additionally, the Council has already made virtual Verification Visits a permanent option.

*[Facilitator Notes: 1) A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the Verification Visit, specifically, a support coach could help an applicant navigate challenges related to scheduling, finding a PD Specialist.]*

*[Facilitator notes: 2) There might be questions and concerns related to the simulation idea; remind participants this group is intended to collect feedback about the ideas and understand perceptions and concerns, as well as identify which ideas should be made a reality. We want to understand their thoughts about it, what would make it work and what concerns them. Mentioning it does not mean it is definitely happening.]*

6. What do you think about the idea of expanding how the Council does virtual Verification Visits? (This includes having more simulations and additional ways to provide evidence of competency.)
7. Do you foresee any challenges in allowing applicants to show competency in different ways? What kinds of complications come to mind? Is there any method you can think of that you think would be well-received or used most often? Why?
8. If there was an app for communication, what would make it useful?
9. What would make a support coach valuable for helping someone through the verification visit process?

### **General Questions**

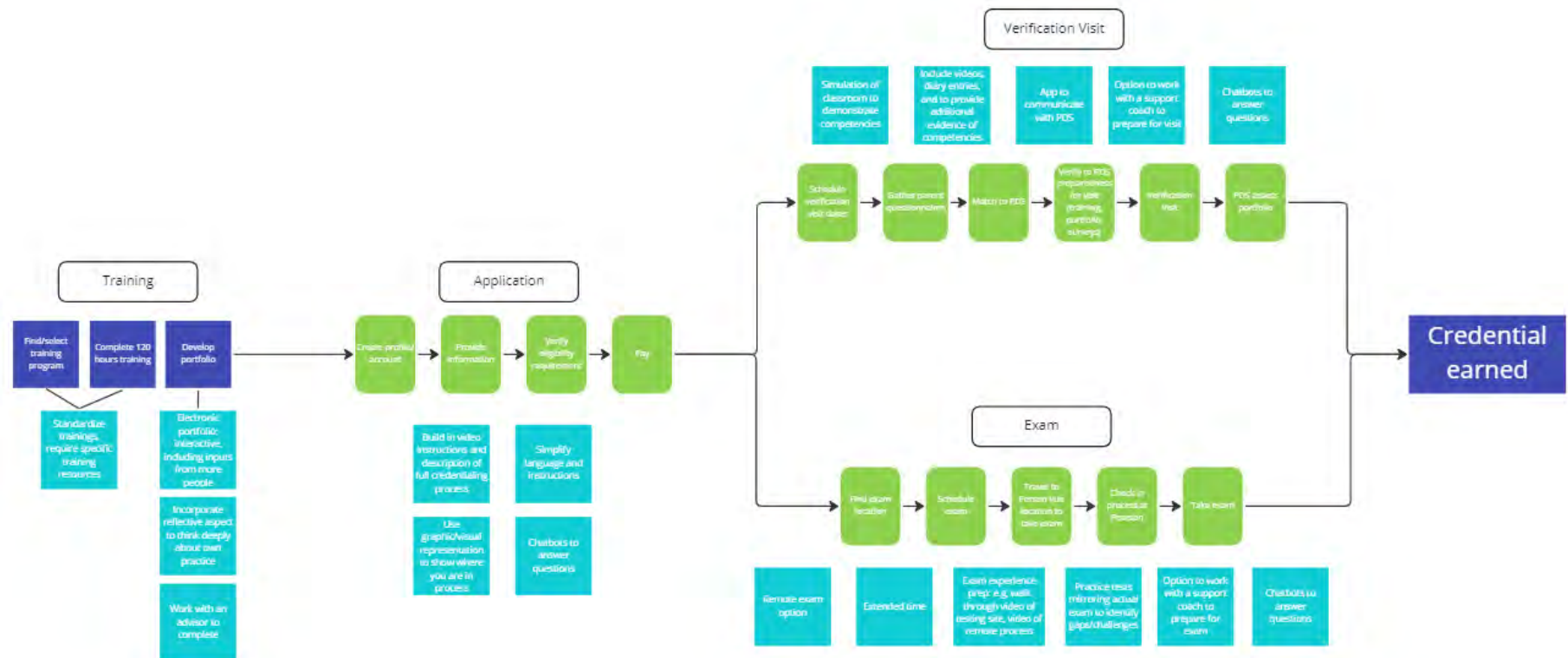
10. If you had to choose just three of the above-mentioned ideas to bring to life, which would they be?



11. Do you think adding chatbots to answer commonly asked questions alongside other digital tools, and/or support coaches, would help alleviate most of the communication issues throughout the process? What would make these tools most helpful?

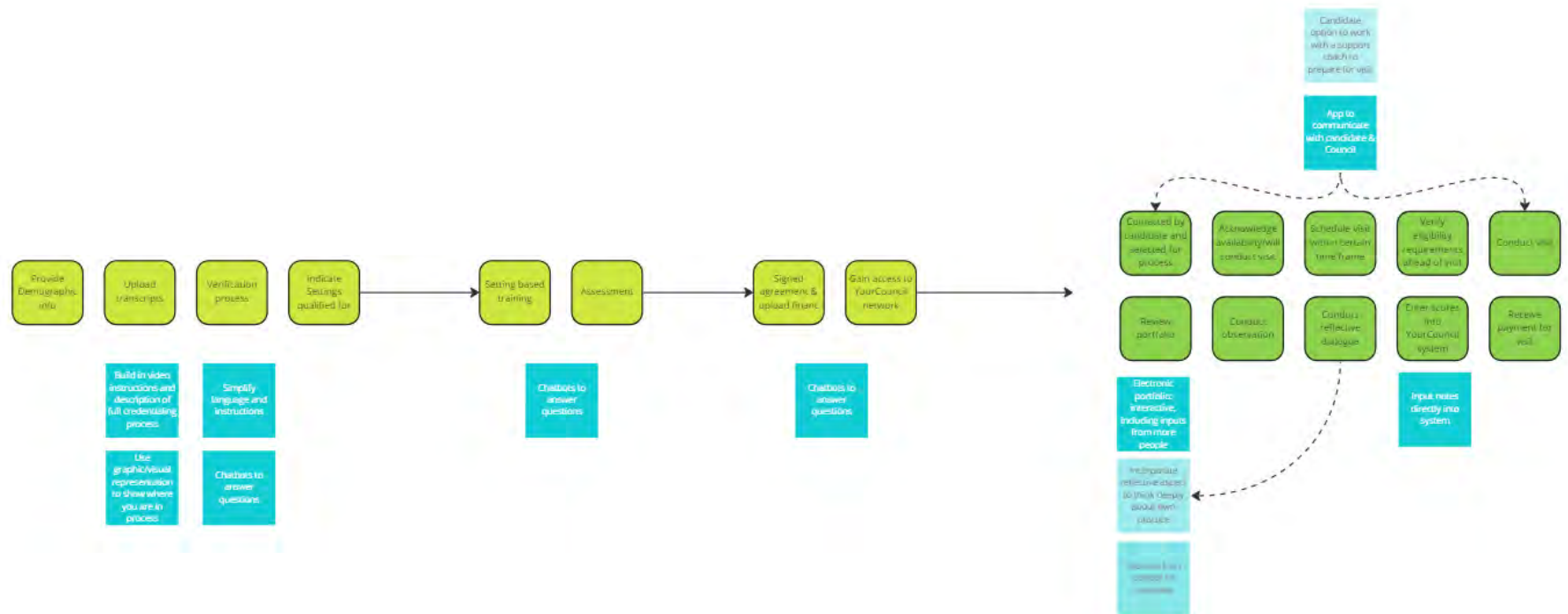
12. Do you see any major difficulties or obstacles to improvement with these proposed changes? Are there any logistical or individual concerns or issues that you think may have been overlooked?

## Appendix D Candidate Process Map





## Appendix E Professional Development Specialist Process Map



# W.K. Kellogg Foundation Report

April 2023



## Narrative

### **What activities were implemented during the past project year to achieve the expected results?**

During the summer of 2021, the Council embarked on the Reimagining the CDA Process project. In collaboration with BCT Partners, we implemented a design-thinking approach and worked to evaluate the credentialing process to identify improvements that could be made to boost usability for all. Design thinking is an iterative process used to solve complex problems by focusing on the user, challenging assumptions, and redefining problems to identify alternative strategies and solutions that might not be instantly apparent based on an organization's initial level of understanding. The design thinking framework traverses six stages: (1) empathize, (2) define, (3) ideate, (4) prototype, (5) test, and (6) implement. These stages reflect the approach's iterative nature and progression from divergent to convergent thinking. Over the past 12 months, with Kellogg's support, the Council focused on stages four, five, and six.

Each stage led us through a process that gathered more information and informed our next steps. Together with BCT, we engaged over 5,000 Child Development Associate (CDA) credential holders and other stakeholders through surveys, focus groups, and interviews to gain a deeper understanding of their pain points. This information provided quantitative data that was then analyzed alongside qualitative data from the Council's credentialing management system. Analysis of this data showed 10 different profiles of candidates likely to obtain a CDA credential. These profiles, based on candidate identity, background, and experiences, represented factors most pertinent to determining the likelihood a candidate would obtain a credential. We found clear differences in profiles and their likelihood of success. Next, we looked at the training a candidate receives. Results of this analysis concluded that the likelihood of a candidate becoming credentialed was linked to a candidate's readiness or level of training received. Candidates receiving lower levels of training were less likely to receive one-on-one support. Finally, we looked at the connection between a Professional Development Specialist (PD Specialist) and a candidate's success. The data uncovered specific challenges and keys to success for candidates in the 10 profiles, resulting in the ideation of 13 solutions to boost usability.

During the past year, working groups met to design solutions and we partnered with BCT to evaluate them with our stakeholders. This testing of our solutions provided the necessary feedback to move forward with strong enhancements to our credentialing process. The generous funding from the W. K. Kellogg Foundation allowed the Council to prototype, test, and begin implementing 13 solutions, including the following:

- Performed an equity audit and made updates to all Council textbooks.
- Enhanced translation capabilities and assessment accessibility options.
- Prototyped an electronic portfolio.
- Designed mockups for a new interface and dashboard for our application system.
- Proposed a candidate support coach.

A full list of the solutions can be found in the attachments.

## **What results (if any), were achieved in the past project year?**

During the project year, the Council focused on two main goals:

1. Implement programmatic innovations aimed at guaranteeing equitable experiences during the credentialing process.
2. Redesign key elements of the credentialing infrastructure aimed at reducing attrition rates and providing equitable access.

Achievements for goal one will be discussed here. Goal two achievements can be found in the “Is there anything else you would like to share with us” section.

The Council engages a diverse community of ECE (Early Childhood Educator) professionals. Currently 37% of CDA candidates identify as speaking a language other than English. Our research showed that engaging individuals in their native language and in the style they prefer is critical to their success. With this in mind, the Council hired a Director of Community Engagement and Learning to focus on evaluating our work through an equity lens. This role supports the Council’s efforts around the coordination, delivery, and communication of anti-racism and inclusive excellence across customers, partners, and staff; and includes designing by the margins and helping diverse communities build their capacity to amplify best practices in the field of early education.

One of the director’s first projects was managing the partnership with the Children’s Equity Project to review and propose updates to the Council’s textbook, *Essentials for Working with Young Children*. The committee analyzed over 500 pages of text and enhanced content related to equity. In March of 2023, the new equity edition of *Essentials* was released. In addition, the group reviewed the Council’s National CDA Competency Standards and proposed changes that will be made available to the field through a public comment period later this year.

To further our commitment to an equitable process, the Council enhanced its Spanish language translation capacity and looked for additional supports to aid individuals through the CDA application process. The translation expansion resulted in 56 high impact projects being translated, including translating all nine of our CDA exams and the new *Essentials* textbook. Additionally, we developed an audiobook version of *Essentials* and procured speech to text software that will be embedded throughout the online CDA application.

Finally, our CDA applicants told us they need flexibility in completing their verification visits and exams. Therefore, the Council decided to offer virtual verification visits (V3) to all CDA candidates, and we are finalizing the rollout of remote proctored exams. The V3 model permits a PD Specialist from any location to observe remotely a CDA applicant, which increases the pool of observers available to our candidates. Therefore, if an Amharic-speaking candidate in Alaska needs a PD Specialist that speaks the same language, they are not limited to finding one in their immediate area. The remote testing option is more convenient for those who need to take their exam outside of normal testing site hours and supports individuals that suffer from test anxiety.

### **What was not successful (if any) in the past project year? What did not work? What surprised you?**

The design thinking process opened our eyes to various opportunities to improve equitable access to our credentialing process. Unfortunately, some of the solutions identified in our proposal to the W.K. Kellogg Foundation cannot be implemented with our current technology, like a secure digital credential that CDA holders can share with their employees. Unsatisfied with the limitations of *YourCouncil*, our current credentialing management system, the Council decided to explore building a new system. In the fall of 2022, the Council engaged Build Consulting, an information technology consulting firm, to conduct an assessment. Over several months, the project team, which consisted of Council staff and consultants from BUILD, conducted dozens of interviews with Council staff and system walkthroughs of *YourCouncil* to understand how each department utilizes the *YourCouncil* system and what shortcomings exist. Upon completion of this exploration and fact-finding process, it became clear that the Council's current system was not agile enough to meet the Council's growing needs, so the Council issued an RFI to identify a vendor to design a more efficient and streamlined credentialing system. The Council recently awarded the contract to RSM US LLP, and they will begin Phase 0 of the design process in April. Phase 0 will identify high level functional requirements and determine a concrete timeline for development and deployment of *YourCouncil 2.0*. As we begin building the requirements for our new system, we will ensure it contains a way to provide CDA holders with access to a secure digital credential that can be shared.

### **What have you learned from the past project year's work?**

Over the past year, we learned that for the Council to make changes that are impactful, it is critical to engage directly with our stakeholders to design solutions that meet their needs. Employing the design thinking methodology allowed the Council to gain a deep understanding of the needs of CDA applicants at various points throughout their credentialing journey, and as a result, we were able to design tailored solutions based on the feedback we received. This resulted in a more equitable and accessible credentialing process for all.

We also learned that we must deliver information to our customers in the languages and formats that they prefer, and that the delivery of that information must be accessible to all. While we have successfully increased our ability to simultaneously release communications and materials in English and Spanish, we still have room to grow. We want to continue enhancing our translation capacity, to include Mandarin, Arabic, and Amharic, as our customer base demands



these languages most. We currently cannot translate all our materials simultaneously, but we are making every effort to ensure the availability of communications and materials by providing interpretation and translation services. For example, we held a focus group with CDA holders who speak Arabic and utilized a company to translate the documents and identified an interpreter to conduct the focus group session.

Finally, we learned that the role a PD Specialist plays in a candidate's journey is a critical component to their successful completion of the credentialing process. To ensure that candidates receive objective Verification Visits from their PD Specialist, we are engaged in the following projects.

- Updating our Comprehensive Scoring Instrument (used to assess a candidate's competency in the classroom)
- Updating the training for our PD Specialists to reflect proposed changes to the tool
- Prioritizing PD Specialists who are highly trained, with multiple endorsements
- Proposing changes to the verification visit workflow for PD Specialists

### **How do you plan to apply the learning to improve your project next year?**

Through the design thinking process, we determined that our customers want more flexibility, increased access to materials in their native languages, multimodal forms of communications, and a more streamlined approach to our Verification Visits. Immediately, we will engage our stakeholders in the design and deployment of *YourCouncil 2.0*. We intend to incorporate an iterative customer testing process throughout the development of our new credentialing management system, so we are certain our new system is as accessible and as efficient as possible.

Additionally, we will continue to expand our translation capacity and alternate format offerings as we build the application pages in *YourCouncil 2.0*. Among other things, we intend to work with professional translation companies to translate our application into the most requested languages of our CDA candidates. To ensure accessibility, we will be adding video tutorials and speech to text technology on all pages in the system.

Lastly, we will finalize the new Comprehensive Scoring Instrument, which we hope will include multimodal assessment options, and we will conduct training for our PD Specialists on the new tool. We also intend to ramp up recruitment of bilingual PD Specialists so we can better meet the needs of our diverse CDA candidates. It is our intent to make our Verification Visit as flexible and streamlined as possible to accommodate the needs of our candidates without jeopardizing the assessment's reliability.

## Is there anything else you want to share with us about your efforts this past year?

As noted above, the Council had two goals this project year. To accomplish the second goal of reducing attrition and increasing equitable access, the Council made several strategic updates to key elements of our credentialing process to ensure those seeking a CDA or those renewing their CDA can easily and efficiently complete the application process. We utilized feedback from focus groups to prioritize system improvements and began building the solutions that were most highly rated by our stakeholders including the following:

- Electronic Portfolio tool
- New Interface and dashboards for YourCouncil 2.0 credentialing system
- Proposal for Candidate Support Coach

The Council began building an electronic portfolio tool that will allow candidates to have an interactive experience when creating their professional portfolio for their CDA application. As we continue to enhance this tool, the Council will explore allowing candidates the opportunity to upload videos to demonstrate their competency in certain areas. Candidates who communicate better orally, particularly those for whom English is not a first language, were very excited about this option during our focus groups. Please find screenshots of the new electronic portfolio in the attached documents section.

Next, to improve the overall usability of the Council's credentialing system, we designed a new interface for our *YourCouncil* 2.0 credentialing application system. Throughout the design thinking process, individuals seeking a CDA or wishing to renew their CDA consistently expressed concerns regarding our application. They described it as tedious and hard to get through. This was especially true for candidates who speak a language other than English. In our focus groups, CDAs and PD Specialists noted that video and graphic representations would make the application easier to navigate, and by including video instructions, it would help individuals who are visual and auditory learners. The redesigned application is clear, concise, and will provide video tutorials. It also includes a dashboard that allows candidates and PD Specialists to see where they are in the application process, what items the Council needs from them, and provide them with a chat feature to connect with the Council for support. Images of the new application and dashboards are available in the attached documents section.

In addition to the updates to our technology infrastructure, we convened working groups to explore and propose ideas to better support our CDA candidates. CDA applicants in seven out of the 10 candidate profiles indicated that they would benefit from having access to support from the Council at various points throughout their credentialing journey. In response to this, we are proposing adding Support Coaches (Coach) to our Customer Support center. The Coach would have a caseload of CDA candidates that they support through the credentialing journey. They would assist with scheduling a Verification Visit, finding and scheduling their exam, answering general questions, and addressing issues that occur during the candidate's application process. We intend to pilot this role in 2023.



**This is the final report on this grant. Reflecting on the entire grant-funded work, what are 1-2 highlights you are most proud of accomplishing and/or setbacks? What is the key message you would like to leave with us?**

Through generous funding by the W.K. Kellogg Foundation, the Council was able to completely Reimagine the CDA process. This project created a more equitable and inclusive credentialing process by engaging with CDA applicants to identify areas for improvement. Through this process, we have gained valuable insights into the struggles that CDA candidates face and identified ways in which the Council can better serve them.

Our exploration of these issues has allowed us to think creatively and develop innovative solutions to address the concerns of CDA candidates. The Council is pleased to report that we will continue this important work in the coming year, and our new technology system will be built, as we continue to implement many of the solutions discussed in our report.

One of the key solutions identified is the development of a new technology infrastructure, known as YourCouncil 2.0. This system will be nimble and adaptable, allowing us to continually respond to the changing needs of our consumers. Our enhanced technology systems will create more opportunities for candidates to interact with the Council and provide better support throughout the credentialing process. We believe that this technology will be instrumental in encouraging candidates to continue to grow professionally after they have earned their CDA, and in turn, increase our vision to ensure all professional early childhood educators meet the needs of our nation's youngest children.

We are deeply grateful to the W.K. Kellogg Foundation for their generous support, which has allowed us to undertake additional phases of the design thinking process and implement solutions that have improved our credentialing process. We remain committed to listening to our diverse community of CDAs and stakeholders to design innovative solutions that meet their changing needs.

In conclusion, the Council is proud of the progress we have made in developing a more equitable and inclusive credentialing process. We look forward to continuing our work in the coming year and beyond, and we are grateful for the support of the W.K. Kellogg Foundation and our community of stakeholders.



## COUNCIL FOR PROFESSIONAL RECOGNITION

### W.K. Kellogg Foundation Report Supplemental Documentation

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## **COUNCIL FOR PROFESSIONAL RECOGNITION** **REIMAGINING THE CDA® PROCESS**

Submitted by BCT Partners  
*January 23, 2023*

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**BCT PARTNERS**  
*Your Partner in Solutions that Matter*

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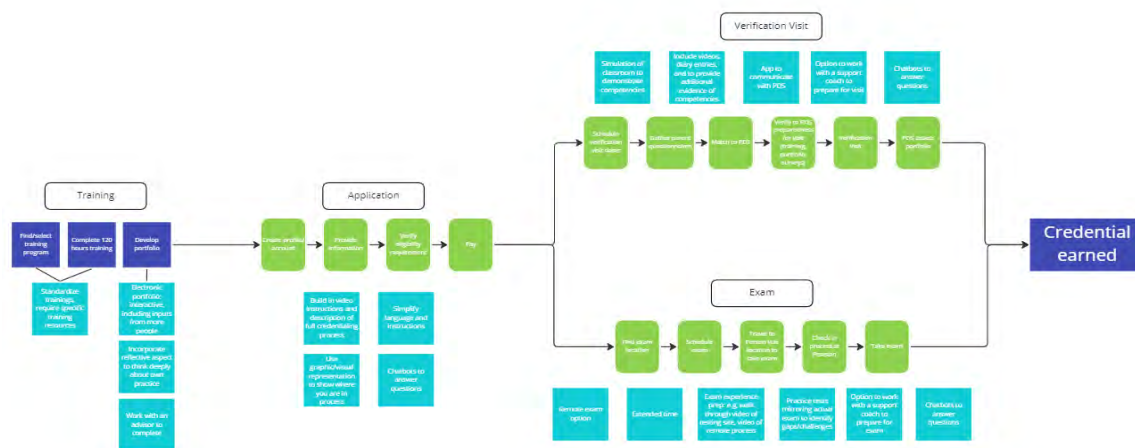
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## Process Overview

Over the last year and a half, BCT Partners (BCT) has been working with the Council for Professional Recognition (the Council) to improve the Child Development Associate® (CDA) credentialing process. This effort started with an intensive review and analysis of experiences and perceptions of the credentialing process by applicants, credential holders, Professional Development Specialists (PD Specialist), and various partners in the early childhood education (ECE) field. Through a precision analytics process, BCT was able to segment the population of candidates into distinct profiles based on demographic, socioeconomic characteristics, and statistics related to the profiles' success with the CDA® process. From the analysis, the Council, with BCT's guidance, generated ideas to improve the credentialing process and, ultimately, outcomes for applicants. These ideas have been refined and prioritized based on both what would have the greatest impact on the most applicants, as well as what is most feasible.

In an effort to gather feedback on the prioritized ideas, BCT Partners facilitated 11 focus groups with a range of stakeholders, including a wide spectrum of applicants and CDA credential holders (CDAs), PD Specialists, and candidate preparation partners (e.g., training organizations), with a total of 61 participants. The CDA focus groups were organized by education level, which is a key characteristic of the profile distinctions, as well as languages spoken, which were English, Spanish, and Arabic. The aim of the focus groups was to understand perceptions of the proposed ideas, as well as considerations to ensure the ideas address challenges and needs of applicants in the process as intended.

In each focus group, participants were provided brief context about challenges applicants experienced during each step of the credentialing process, followed by the Council's ideas to address the challenges. Focus group facilitators also showed a process map of the credentialing process with the proposed ideas (see Figure 1). Participants were asked to respond to specific questions about each proposed idea (see Appendices for the full focus group protocols).



**Figure 1: Candidate Process with Proposed Ideas in Teal (See also Appendix D)**

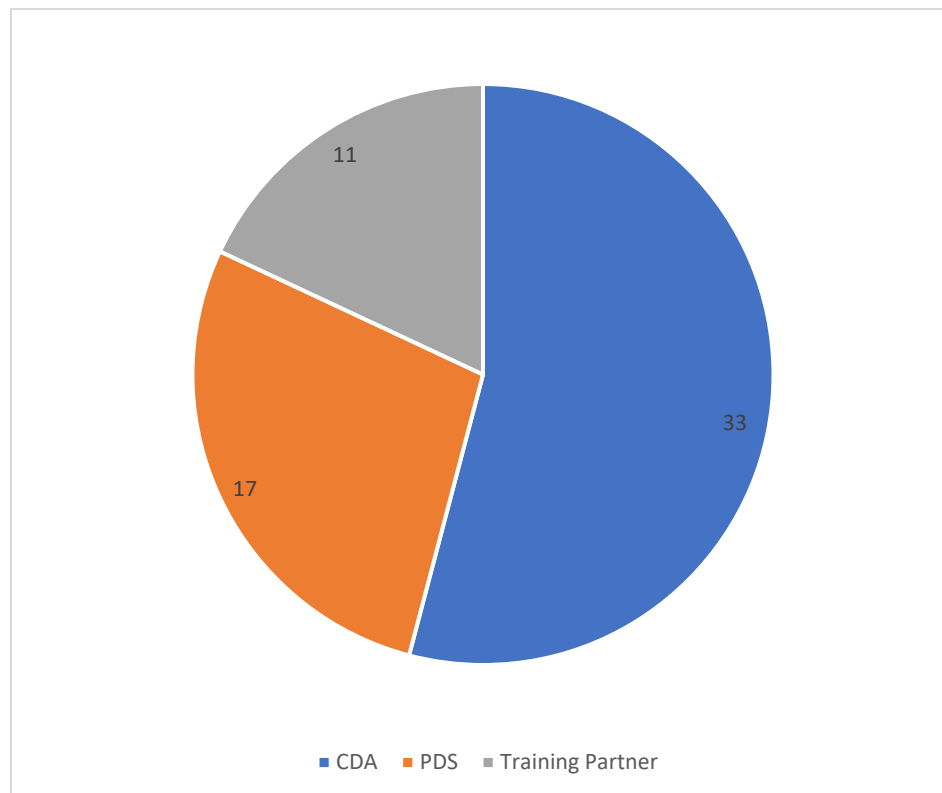
Following the focus groups, the BCT Partners team synthesized all responses and provided recommendations to the Council. A summary of the findings, including the perceived benefits, concerns (when applicable), and considerations gleaned from the focus groups is outlined below.

## Participants

BCT worked with the Council to identify participants for the focus groups. The Council sent an email to several hundred individuals from the CDA network, which included a link to indicate interest and provide demographic, educational, and role information. For CDA/candidate focus groups, BCT invited everyone who responded to the survey to a focus group, with the exception of those who are also PD Specialists. For PD Specialist groups, BCT considered race/ethnicity, education, geography, as well as availability, to create a representative group of PD Specialists. The below charts provide information about who participated in the focus groups.

### All Focus Group Participants

As mentioned above, there were a total of 61 focus group participants. The following charts provide a summary break down of roles of participants, ages, location, gender, and primary languages spoken by participants across all 11 focus groups.

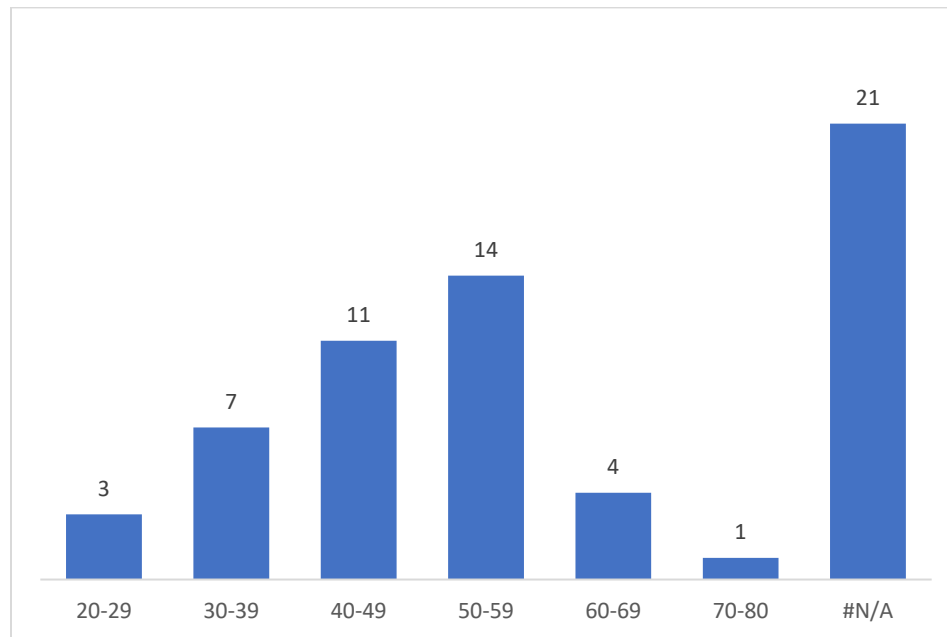


**Figure 2: Number of Participants by Role**

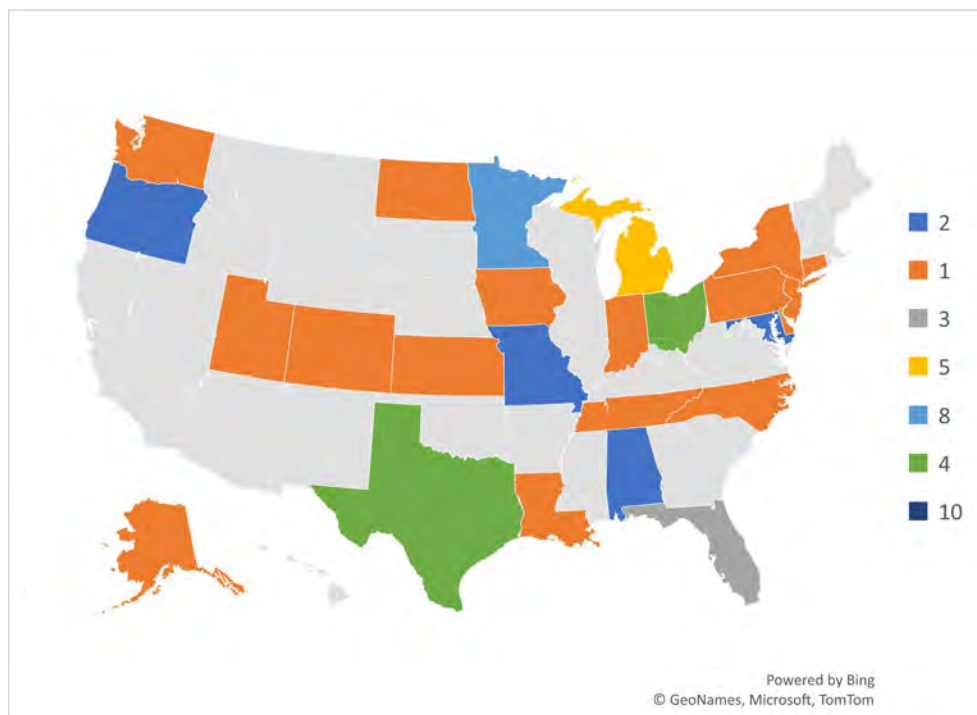




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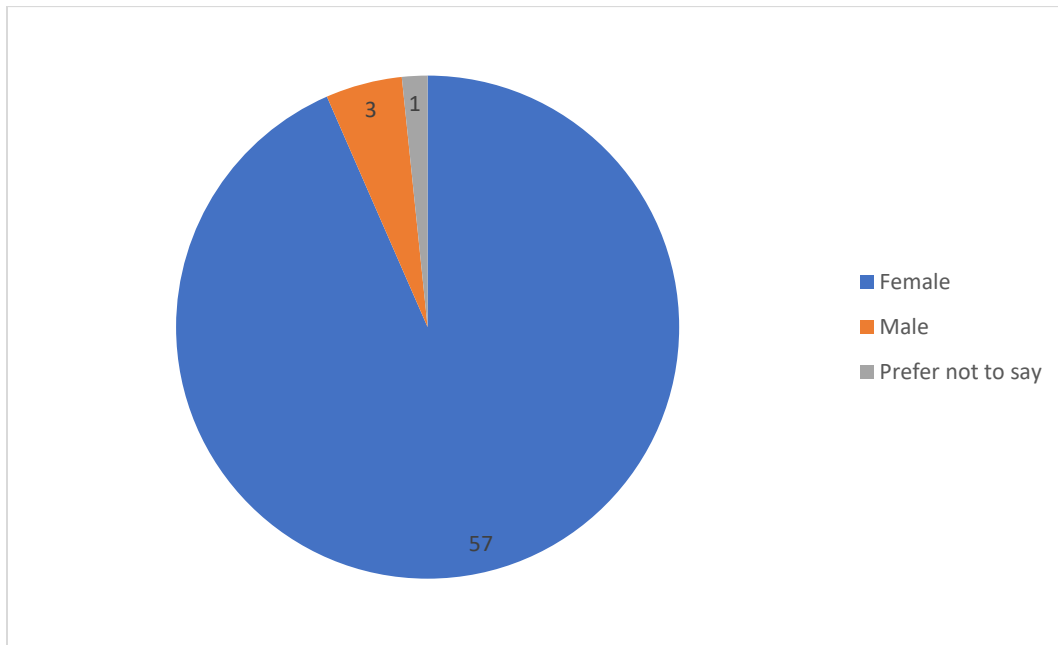


**Figure 3: Age Range of All Participants**

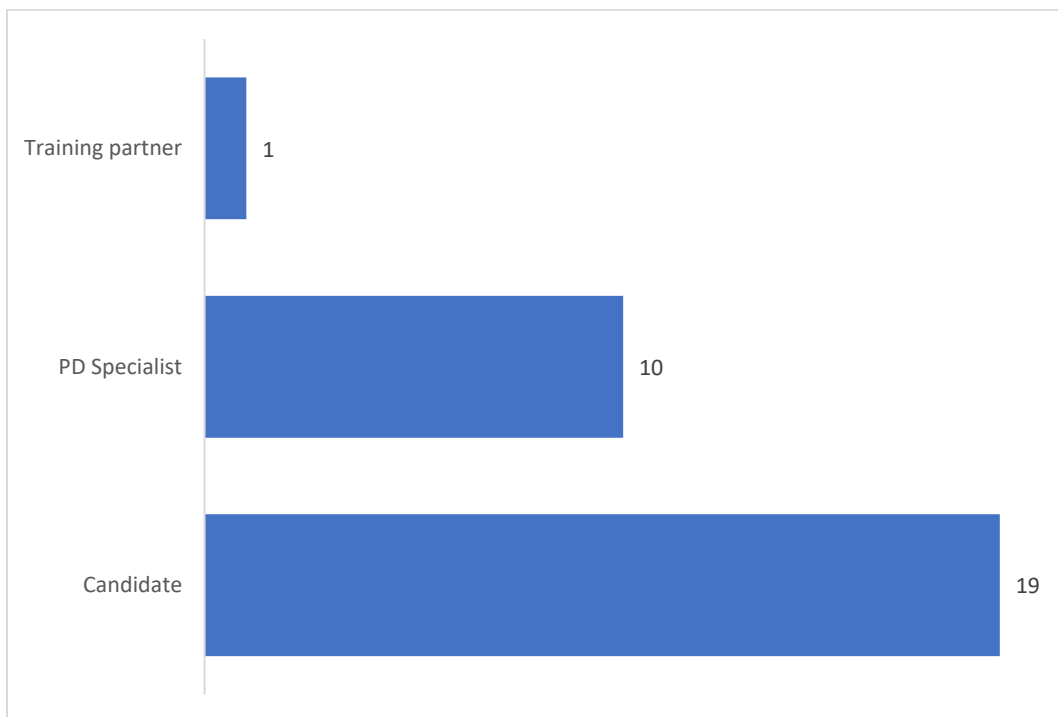


**Figure 4: Participants by State<sup>1</sup>**

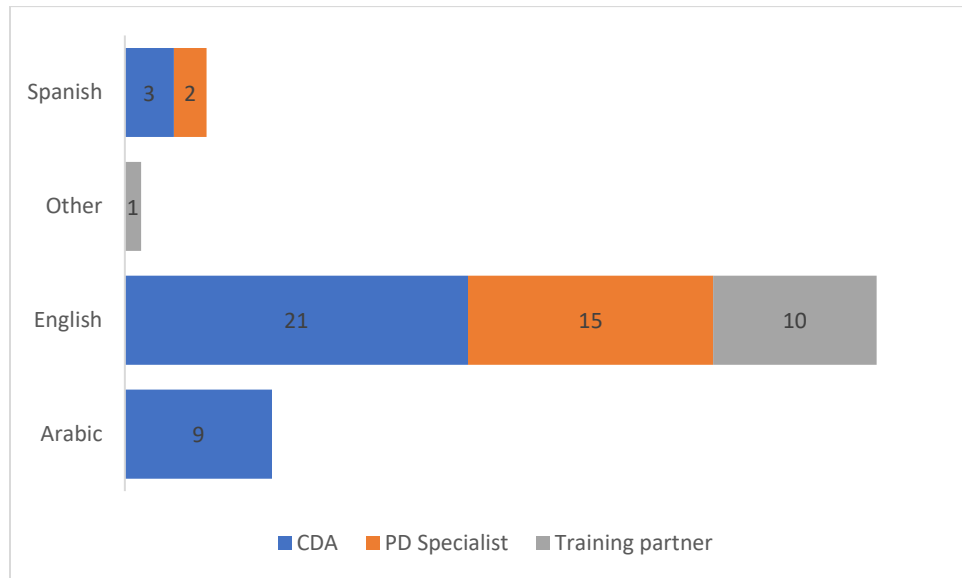
<sup>1</sup> Map is missing 3 participants from Puerto Rico



**Figure 5: Gender Identify of All Focus Group Participants**



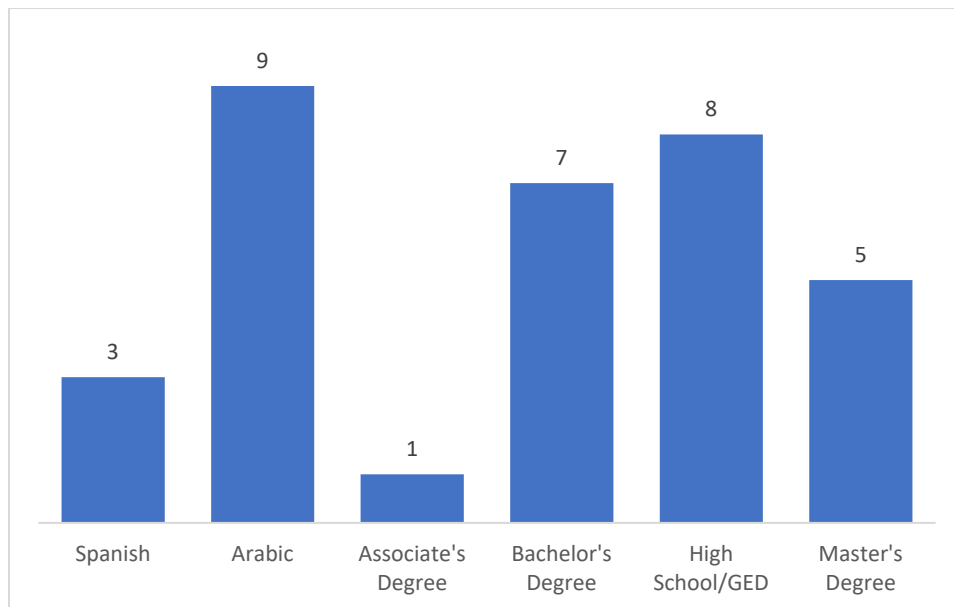
**Figure 6: Participants with CDA Credential by Role**



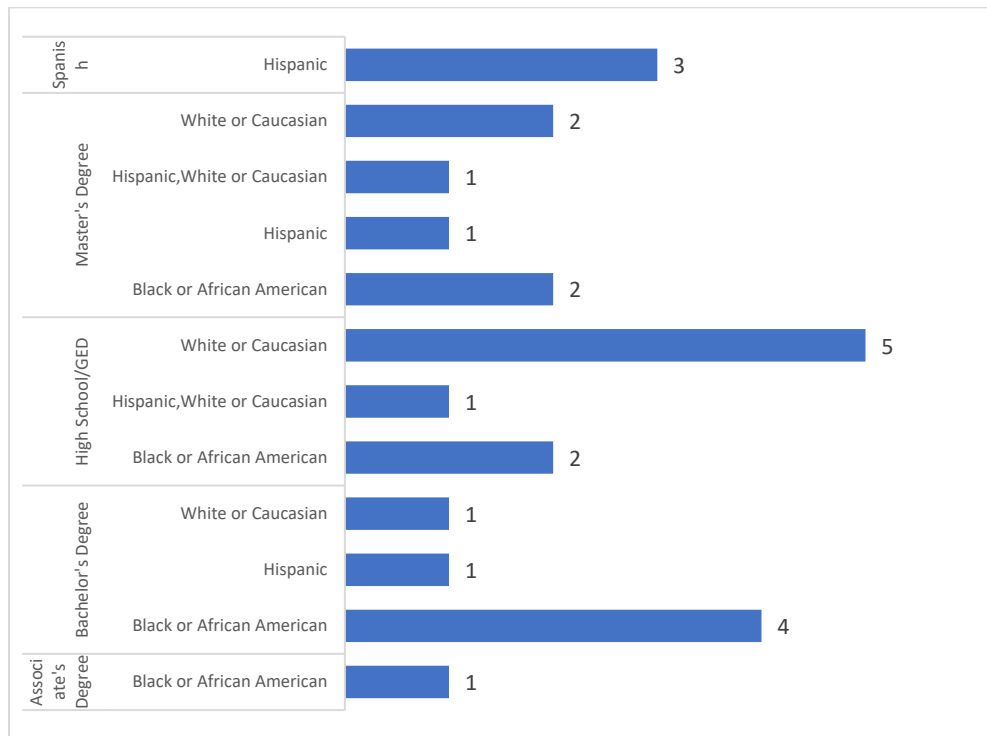
**Figure 7: Primary Languages Spoken**

### CDA Participants

The below two charts provide further information about the participants in the CDA focus groups, including numbers of participants in each group and race/ethnicity of participants by group.



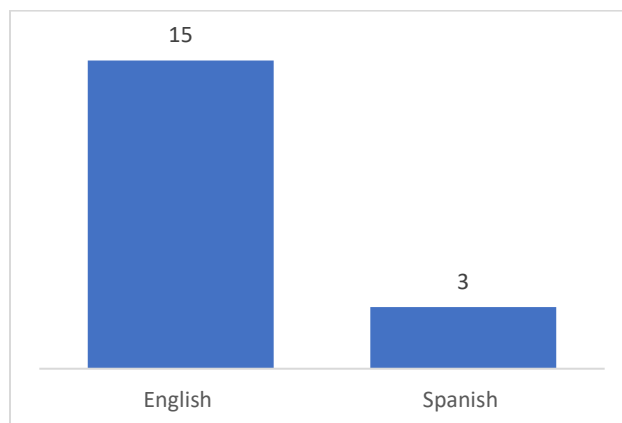
**Figure 8: Number of Candidates by Group**



**Figure 9: CDA Groups by Race/Ethnicity (Excluding Arabic Group<sup>2</sup>)**

### PD Specialist Participants

The following charts provide information about PD Specialists that participated in focus groups, including primary language, race/ethnicity, and education.

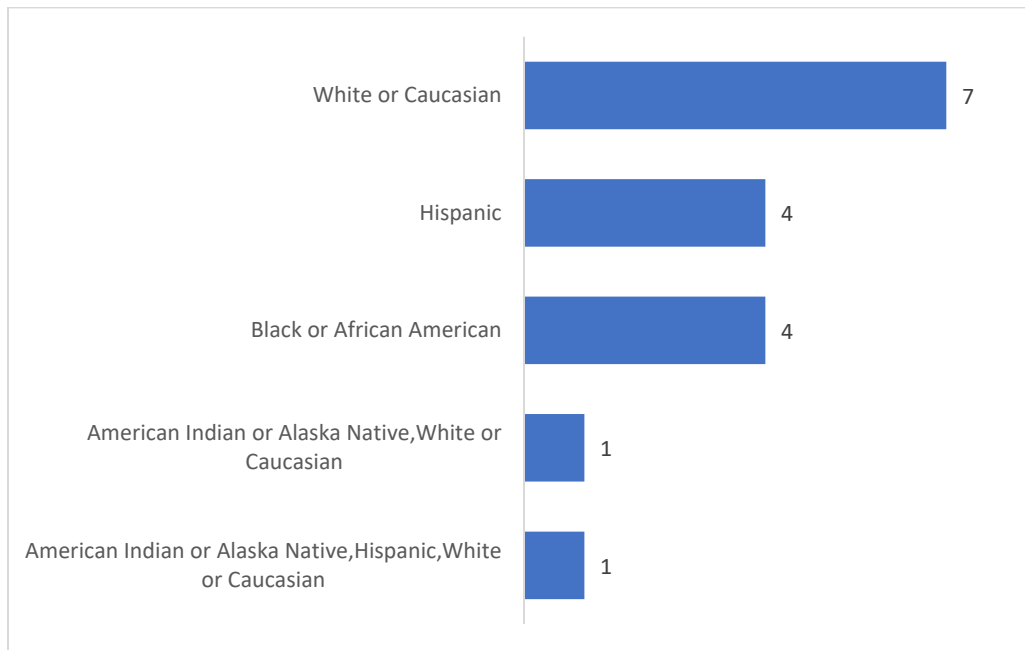


**Figure 10: PD Specialists by Group Language**

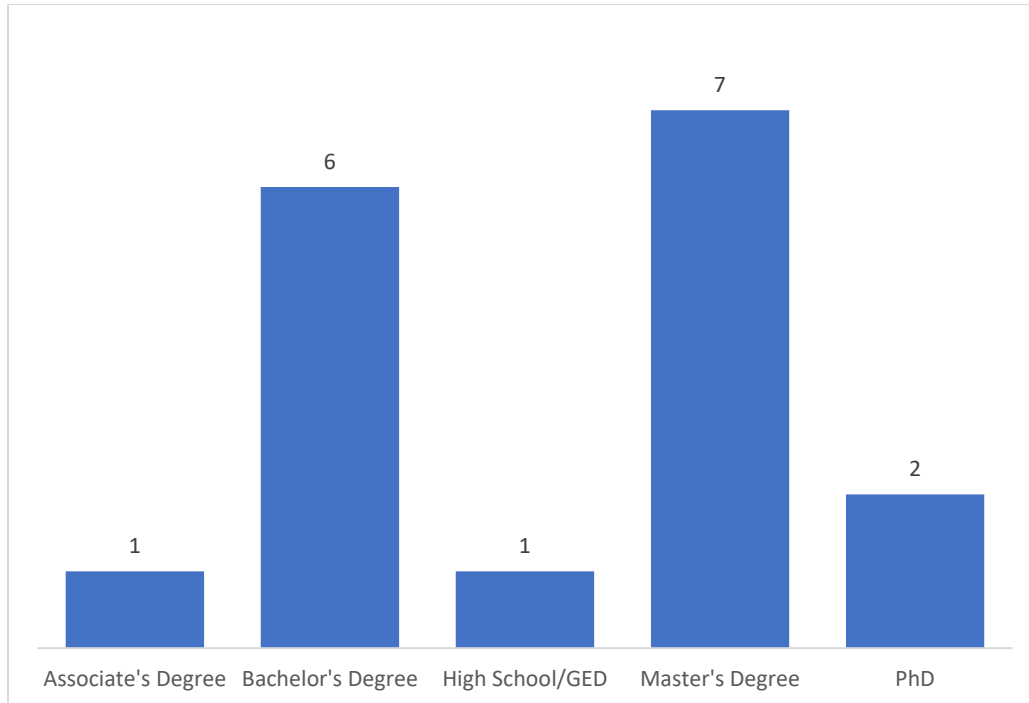
<sup>2</sup> \*The Arabic focus group was selected differently and this data was not collected about each participant.



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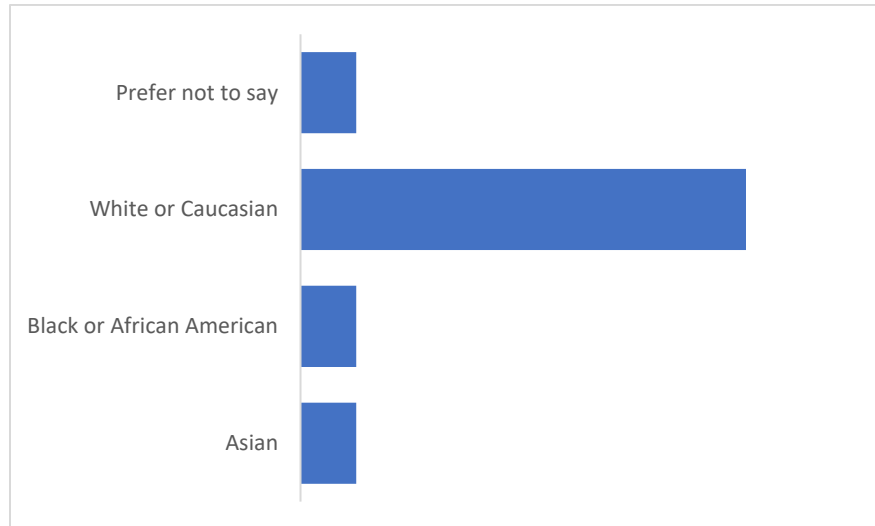
**Figure 11: PD Specialists by Race/Ethnicity**



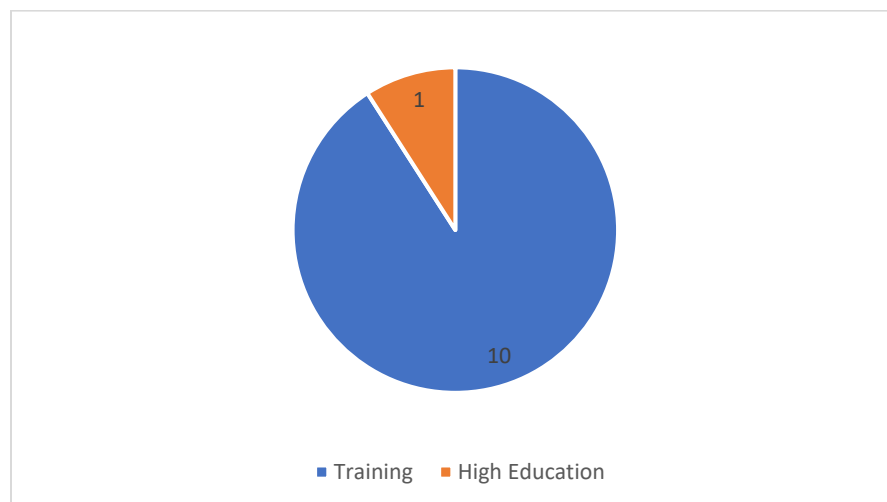
**Figure 12: Education of PD Specialists**

### Training Partner Participants

The training partner focus group included 11 individuals coming from 7 different organizations. Of these individuals, 3 (27%) come from Gold Standard organizations. The following charts provide information about training partners that participated in focus groups, including race/ethnicity, as well as information about the types of organization they represent.



**Figure 13: Training Partners by Race/Ethnicity**



**Figure 14: Training Partners by Type of Organizations**

## Feedback on Proposed Ideas

BCT Partners facilitators synthesized the feedback heard from all focus groups to find trends and themes in responses. The following section provides detailed summaries of participant feedback to each idea proposed to improve the CDA credentialing process.

### Training Standardization

The Council proposed standardizing elements of the CDA training, specifically requiring all training programs to use specific training materials and resources. Focus groups participants were asked about:

- Whether they think it is useful to create universal standards for training that include requiring specific resources to be used by trainers
- Barriers or obstacles to making this change
- What would need to happen to successfully implement training standardization

### Benefits

There was widespread agreement that some standardization of the CDA training would be beneficial to ensure program quality. Participants from all groups—credential holders, PD Specialists, and partner organizations—acknowledged there is a wide array of training options that range in quality. These disparities in training quality lead to disadvantages in the credentialing process for candidates who receive lower quality training compared to those who receive higher quality training. Therefore, standardization of trainings could eliminate some of these disparities.

### Concerns

While all groups agreed that some standardization might be beneficial, the groups of PD Specialists and partner organizations expressed concerns. Both PD Specialists and partner groups were concerned that standardization would not allow training to be tailored to specific contexts, which is an important aspect and principle of the CDA credential. They noted that while the Council's educational materials, including *Essentials for Working with Young Children*, are valuable, they do not (and cannot) sufficiently drill down into the specifics of demonstrating competencies in the communities where candidates live and work. Partner organizations were also concerned about the expectations related to covering the cost of materials. Some organizations buy the workbooks for participants but do not buy the textbooks because of cost; other organizations do not even buy the workbooks for participants. They are concerned they would be expected to buy more materials they cannot afford (e.g., textbooks, workbooks), particularly as they also have expenses related to aligning with national standards. They also have concerns about passing the cost on to candidates, who may not be able to afford the resources in addition to course registration. Some CDAs also raised questions in their focus groups about who will pay for these resources if they become required.

Lastly, partner organizations also articulated concerns about standardizations aligning with all state requirements, registries, and approval systems. Given the wide range of systems and requirements across all states, partners were skeptical that standardization of trainings could work.



### Considerations

Given the acknowledgment there could be value in standardizing the trainings more, participants in all the focus groups offered suggestions and considerations to effectively implement this change, should the Council decide to do so. Partner organizations expressed the importance of making sure any standardization aligns with registries and approval systems in every state, as well as aligning with national standards. They also stressed the need to ease into any standardization requirements to allow organizations the time and ability to prepare for such a transition.

Regarding the concern about cost, participants suggested making an online version of *Essentials* to be accessible anywhere and at a lower cost. Additionally, perhaps the Council could offer subscriptions or discount options to make it more easily attainable for candidates and training organizations.

Lastly, partners and CDAs suggested focusing on trainers as a way to improve quality of trainings. Partners suggested building capacity of trainers to be sure they are equipped with the skills and knowledge to provide high quality trainings. CDAs, particularly in the non-English speaking groups, indicated the most important consideration about training is that trainers must be culturally competent and sensitive to candidate needs, including speaking candidates' languages.

### Electronic Portfolio

The Council proposed creating an electronic portfolio option to allow candidates to have a more interactive portfolio experience and include inputs from more people. Focus group participants were asked:

- What they think about the option of an electronic portfolio
- Whether allowing more input from more people would be helpful to the process
- Whether they would find it helpful to incorporate more reflective aspects of the credentialing process
- Advantages and disadvantages to a separate portfolio login from registration and application

### Benefits

Participants across all groups responded positively to the idea of an electronic portfolio. CDAs perceived this change could offer increased opportunities to be creative, particularly if it allows the ability to upload pictures and videos to demonstrate competencies. Allowing candidates to show competencies through videos would help those who communicate better verbally than in writing, particularly those for whom English is not a first language. They also responded positively to the opportunity to allow more input from more people, particularly colleagues who are deeply familiar with and able to speak to their competencies. Additionally, they responded positively to incorporating more reflective questions into the portfolio.

PD Specialists particularly appreciate that an electronic portfolio would allow them to review it in advance of the Verification Visit. Some PD Specialists do not think there is value to including input from more people, while others think it is fine to do so. They did respond positively to including more reflective questions into the portfolio, which could make the reflective dialogue more efficient in the limited time a PD Specialist has with a candidate.

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## COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA PROCESS REPORT

While this idea was well liked by all groups, it was most highly appreciated by CDA groups with higher levels of education. These CDAs suggested it would be easier to work with an advisor, trainer, or other mentor to get feedback throughout the portfolio development process. One participant mentioned a CDA course where they use shared Google documents to submit components of their portfolio to the instructor for feedback and print their completed work to paste into their portfolio. This process could be integrated into an electronic portfolio development process more broadly. An electronic portfolio would also make it easier to gather input from additional people, including families, by sending them a link to fill out a survey rather than relying on paper surveys.

Participants from the partner organizations, generally, reacted positively to the electronic portfolio. Some said it should definitely be an option, particularly since some trainings happen exclusively online. This is also an opportunity to create a user-friendly format that simplifies the portfolio development process for candidates with fillable sections that do not require referencing information and examples in multiple places.

### *Considerations*

The most articulated consideration across most focus groups is that, if an electronic portfolio option is introduced, there must still be an option for applicants to create a hard copy version of the portfolio. Older CDAs are less likely to want another electronic tool, though they realize it could be valuable for some candidates. Non-English-speaking groups liked the idea but expressed concern that it might create challenges for those who are not technologically literate and/or have limited internet access. Partner organizations want to be sure candidates who do not have a computer and/or have limited technological skills can continue to create a physical portfolio.

CDAs had mixed feelings about an electronic portfolio option with a separate account login. Some participants see it as an expectation, whereas others expressed concerns about having another system to keep track of.

A few participants in CDA groups mentioned concerns about security breaches with an electronic portfolio and wanting to make sure any system is properly secured to avoid loss of work and sharing of personal information.

Professional Development Specialists would like to see the review process of the portfolio streamlined and simplified with an electronic version. Specifically, they would like to be able to assess the portfolio ahead of the visit, to spend less time reviewing it when with the candidate, and more time in a visit on the reflective dialogue.

### *Advisor*

The Council proposed re-introducing the advisor role to support individuals in the process of preparing to apply for their CDA. The advisor, which was a role that existed in an earlier iteration of the credentialing process, would be a mentor in the early childhood education sector for applicants as they prepare to apply for the CDA credential. Focus group participants were asked:

- Important considerations for the advisor role to make it valuable for potential CDA applicants (e.g., location, availability, experience, access, process to find an advisor)

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## COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA PROCESS REPORT

- About concerns finding an advisor
- Whether an advisor should be in an individual's community or if this could be a virtual support role

### *Benefits*

Participants across all CDA focus groups liked the idea of having someone to provide support as individuals prepare for the CDA. Noting that it can be an intense process, they liked the idea of having someone familiar with the CDA process be a guide to them. Many CDAs indicated having people through their training programs who served this role, and that it was very helpful. Re-introducing the advisor role as part of the process would create a more consistent, standardized experience for candidates, with everyone benefiting from support leading up to the application process. Non-English-speaking CDAs articulated a need to have advisors that speak the same language as the individual being supported.

PD Specialists who experienced the process with the previous iteration of the advisor role noted that it was a valuable resource for individuals preparing for the credentialing process.

In the partner organization focus group, participants shared that many organizations, programs, and states already have a model that connects candidates to advisors. Where this exists, is seen as very effective and valuable to help individuals through the credentialing process.

### *Concerns*

One concern related to introducing the advisor role is that there would be too many people involved throughout the process, creating confusion about who to go to when seeking help. For CDAs, this was expressed if there is both an advisor through the Council as well as through a training program. Some PD Specialists expressed concern that there would be inconsistent information given when there is both an advisor and a PD Specialist involved.

CDAs also expressed concern about finding advisors that are committed to supporting them in the process and have the bandwidth to do so. If they have to find someone on their own, some might have challenges finding someone who has both the time as well as the expertise and knowledge to play this role. They also would not want it to become a requirement that someone is just checking off boxes, but that they are advising them.

### *Considerations*

CDAs expressed that an important qualification of the advisor would be that it is someone who is deeply familiar with the CDA credentialing process, specifically that it should be an individual who either has a CDA or works for the Council. PD Specialists, similarly, said that anyone who becomes an advisor should be vetted by the Council to be sure they are sharing correct information with the candidates about the credentialing process. Partner organizations articulated that, where this kind of role is already happening, it should be allowed to fit into the Council's advisor model to avoid duplicating efforts, causing confusion, and to bolster programs that are already experiencing success.

Participants in all groups agreed that it would be most ideal to have an advisor within an individual's community, but that this role can be a remote one as long as the advisor is mindful of the individual's learning style and language. It would be best to have both in-community and remote options for those

who live in communities where it is likely hard to find someone, for example in small and/or remote communities. Ideally, the Council could help facilitate finding an advisor, particularly for those who reside in smaller or remote areas and/or cannot find someone within their own community.

### Application Enhancements

The Council proposed improvements to the application process and system to make it easier to navigate. The specific features include building in video instructions and a description of the full credentialing process, simplifying language and instructions in the application, and using graphic/visual representation to show applicants where they are in the process. Focus group participants were asked:

- What they think of each of the ideas
- Whether these changes would help individuals navigate the process more easily

### Benefits

Each focus group liked all the ideas for improving the application. In particular, CDAs and PD Specialists noted that video and graphic representation would make the application easier to navigate and including video instructions helps appeal to different learning styles and needs. CDAs appreciated these ideas because many have found the current application system confusing and counterintuitive and would prefer a simplified, more user-friendly, application process.

### Considerations

Participants, particularly in the non-English-speaking groups, asked that all application improvements include other languages so all applicants can benefit from the enhancements. Specifically, graphics and videos in other languages will be helpful for non-English-speaking applicants.

Bilingual (English/Spanish) CDAs also requested having both English and Spanish translations in the same place, rather than separate applications. This request was largely because of perceived inconsistencies in translations and would allow them to review instructions in both languages while completing the application.

Given the application is all online, CDAs said there should be a good technology support team to address any glitches and assist applicants having issues. PD Specialists commented that the current site is hard to use and often glitches, so the application system must work smoothly for these enhancements to be of value. Additionally, a resource page or frequently asked question page would make it easier for applicants to find information they need.

### Chatbots

The Council proposed introducing chatbots to give applicants and candidates access to a 24/7 service to answer commonly asked questions immediately. Focus group participants were asked:

- What they think of this idea and whether it would help individuals navigate the process more easily
- Whether adding chatbots to answer commonly asked questions alongside other digital tools, and/or support coaches, would help alleviate most of the communication issues throughout the process

- What would make a tool like this most helpful

### *Benefits*

Participants in all groups like the idea of having a 24/7 access point to the Council to ask questions. Some CDAs said they like this idea because it can be preferable to type in questions rather than waiting on the phone for a response, particularly for general questions that should be quick to answer. The primary interest in having chatbots is to have an easy access point to the Council to obtain information needed to navigate the credentialing process when questions arise.

### *Concerns*

The primary concern expressed by most CDAs about chatbots is that they want to know there is a person behind the chat to answer questions. CDAs and PD Specialists articulated frustrations trying to get answers to questions and be in contact with the Council and they want the chatbot to be an avenue to connect with people at the Council for assistance when they need it. Non-English-speaking CDAs were most concerned that a chatbot would allow applicants and candidates to ask questions in the chat in their own language. PD Specialists raised concern about chatbots replacing opportunities to speak with people.

### *Considerations*

Overall, for the chatbot to feel valuable to candidates and PD Specialists, they need to know that their questions will reach a person and will ultimately lead to having their questions answered in a timely manner. The chatbot could also lead to a resource page with links to information about the whole process, which candidates would likely find helpful to have commonly asked questions easily answered. As long as the chatbot is part of a broader communication and support system, and there are still opportunities to speak with people, it could be a valuable tool to address communication issues with the Council.

### *Simulation Verification Visit*

The Council proposed exploring the use of classroom simulations to collect evidence of candidates' competencies as a virtual option in place of a traditional in-person Verification Visit in a candidate's classroom. CDA focus groups were asked:

- Thoughts on expanding how the Council does verification visits
- Whether they foresee challenges in allowing candidates to demonstrate competencies in different ways than have been done, particularly with an in-person, live verification process
- What complications they anticipate

### *Benefits*

CDAs across all groups expressed excitement about ideas that would allow the Verification Visit process to happen more efficiently, with many people citing experiences of long wait times and scheduling challenges, particularly during the pandemic. They expressed that new ways of verifying competencies that facilitate an easier logistical process are valuable, and that the downside of losing the real-time, in-person experience was okay because a Verification Visit is never a fully accurate representation of a typical day when they are aware that someone is watching them. The groups most excited about

introducing new options for verifying competencies were those with High School/GED level of education, as well as those with some higher education.

### *Concerns*

There were some concerns raised by CDAs across all groups about introducing a simulation option to verify competencies. One concern is that people often know how to answer questions based on what they should do, but it may not fully capture what a candidate actually would do in a situation. For example, someone might know what they should do when encountering a challenge in a classroom, but when confronted with that challenge, may not actually respond that way when there are several children with competing needs and additional distractions present. Additionally, a simulation will not capture everything you would see in a real environment. In particular, it would not capture the nuances of an individual's specific work environment, for example different layouts, equipment, and other factors that may be unique to where someone works.

PD Specialists were not specifically asked about simulations as an option. However, they did express opposition to Verification Visits that are not live, and ideally in person, because they believe those are the only true ways to demonstrate and verify competencies in early childhood education.

### *Considerations*

Overall, focus group participants had a difficult time envisioning what a simulated verification experience would actually look like and how it would fit into the process, so much of the discussion about simulations was more broadly about the value of alternatives to an in-person Verification Visit. CDAs talked about increasing virtual visits by video conferencing as an example of what they are familiar with and see as valuable.

### *Additional Forms of Evidence*

The Council also proposed an option to provide videos, diary entries, and other forms of submission to demonstrate evidence of competencies. CDA focus groups were asked:

- Thoughts on expanding how the Council does Verification Visits
- Whether they foresee challenges in allowing candidates to demonstrate competencies in different ways than have been done, particularly with an in-person, live verification process

### *Benefits*

CDAs articulated the same benefits to this idea as the simulation: new ways of verifying competencies that facilitate an easier, more efficient, and timelier logistical process are valuable, and the downside of losing the real-time, in-person experience was okay because a Verification Visit is never a fully accurate representation of a typical day when they are aware that someone is watching them. Additionally, this idea would allow individuals with different communication styles to present evidence in ways that best captures their competencies. As with the simulations, the groups most excited about introducing new options for verifying competencies were those with High School/GED level of education, as well as those with some higher education.

### *Concerns*

Some of the concerns about providing additional forms of evidence mirrored the concerns about a simulation to demonstrate competencies: people often know how to answer questions based on what they should do, but it may not fully capture what a candidate actually would do in a situation. Although PD Specialists were not asked specifically about this option as a substitute to the current visit process, again, they did express that additional evidence could be valuable, but not to replace a live (and, ideally, in-person) visit. Additionally, CDAs spoke about one logistic challenge being that it can be hard to plan for events they might want to capture, and thus not knowing when to video. There may also be challenges around getting permission to video children.

### *Considerations*

In the discussion about this proposed idea, some CDAs noted there could be an opportunity to tie this form of demonstrating evidence of competencies to an electronic portfolio, if that is developed. CDAs also want the Council to consider that many candidates might not have up-to-date technology, so any systems in which evidence is uploaded should be able to support different video formats.

### *Auto-Assign Professional Development Specialists to Candidates*

The Council proposed beginning to automatically assign a PD Specialist to a candidate or providing a list of several PD Specialists in their area for a candidate to contact, in place of the current system of candidates identifying and reaching out to a PD Specialist. Participants were asked about their thoughts on this idea.

### *Benefits*

CDAs and PD Specialists articulated this option could be valuable for candidates who are in areas where there are not many PD Specialist options. For example, for candidates in more remote or rural areas where there are only a few PD Specialists for the whole area (or, at times, none at all), assistance matching would be helpful. A system like this might also reduce the time spent reaching out to multiple PD Specialists, if PD Specialists' availability is incorporated into the matching process.

### *Concerns*

Some CDAs expressed concern that automatically assigning a PD Specialist would be difficult to coordinate and might lead to challenges in communication.

PD Specialists did not like this idea because, they said, a candidate selects a PD Specialist based on specific criteria, and they want to be sure those criteria are still considerations in how a PD Specialist is matched to a candidate. Specifically, they mentioned selecting based on distance, and expressed concern that a PD Specialist might be matched to a candidate farther away.

### *Considerations*

If the Council moves toward a system of assigning PD Specialists or providing a select list of PD Specialists to a candidate, these assignments should be based on the same selection criteria that candidates currently use to find a PD Specialist on their own.



### Support Coach

The Council introduced the idea of an option for a candidate to work with a support coach for scheduling help with their Verification Visit and/or the exam. A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to the credentialing process. For the Verification Visit, specifically, a support coach could help an applicant navigate challenges related to scheduling and finding a PD Specialist; for the exam, a support coach could help an applicant navigate challenges related to scheduling and finding a testing site. Focus group participants were asked:

- What would make a support coach valuable for helping someone through the Verification Visit process
- What would make a support coach valuable for helping someone through the exam process
- How the addition of a support coach could help PD Specialists
- Any challenges that might arise with the introduction of support coaches

### Benefits

CDAs of all groups expressed that any support to help with scheduling would be valuable for candidates in the process. Scheduling both the Verification Visit and the exam can be overwhelming with a variety of challenges coming up, and it can be hard to get help from the Council to address the challenges. Having a dedicated support person to help navigate these processes would be beneficial. Non-English-speaking CDAs, in particular, want to see this idea prioritized. PD Specialists talked about the need for improved communication with the Council, acknowledging that support coaches could help improve communication challenges by having a specific person to direct questions to.

In addition to the logistical support, PD Specialists said it would be helpful for support coaches to help candidates prepare for the exam by making sure they understand questions and scenarios in practice exams. They could also help prepare candidates with the technical aspects, making sure they understand how to navigate the exam technology.

### Concerns

PD Specialists expressed some concern about having too many people involved in the process. Some felt that candidates would be less likely to reach out to a support coach because they would prefer to communicate with their PD Specialist. This concern seemed to be based on the assumption that candidates know their PD Specialists better and would therefore trust them with their questions more so than an unknown support coach.

### Considerations

CDAs, especially from the Arabic-speaking groups, expressed that, for successful implementation of the support coach role, the support coach model, and the individuals who fill this role, must be culturally sensitive. PD Specialists think this role could be beneficial but are most interested in having support coaches available to them to provide support for questions and resources.

It is important there is clear delineation of roles between support coach and PD Specialist, both for the candidates and PD Specialists. Candidates will need to understand who to approach when questions or

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issues arise. PD Specialists will need to understand when it is their role to answer questions and when to redirect to a support coach.

CDA groups with highest levels of education indicated support coaches could be valuable to many candidates, but if they had to choose, they would prioritize virtual visits over this idea.

### Communication App

The Council proposed the development of a communication app for candidates to communicate directly with PD Specialists to coordinate the Verification Visit, and for PD Specialists to have a tool to communicate directly with Council staff. Participants were asked:

- What would make an app useful
- Whether this kind of app is necessary and if they would use it
- Whether there are better ways for real-time communication with the Council and between candidates and PD Specialists

### Benefits

CDAs across various groups said an app would be valuable if PD Specialists upload their availability so it can be used for scheduling. There were CDAs within each group across different education levels that see the benefit of an app to more easily reach out to a PD Specialist or have contact with more than one PD Specialist as they try to coordinate and schedule a Verification Visit. Some CDAs, particularly in the High School/GED group, said they had challenges connecting with their PD Specialist, and did not get any information from them ahead of the visit, so if an app helped to make sure a PD Specialist responded to messages from a candidate, it would be helpful.

### Concerns

Many CDAs, especially in the non-English speaking groups (both Spanish and Arabic) do not feel an app like this is necessary because they can reach a PD Specialist by phone, if necessary. Additionally, many candidates and PD Specialists use WhatsApp to communicate with one another and find that to be a helpful resource. They do not want another system to sign into, so using an existing app is preferable.

PD Specialists did not like this idea because they do not want another application to have to track. They, too, find it easier to use texting and/or WhatsApp.

### Considerations

Some candidates articulated that, if the Council developed an app for CDA candidates, it might be useful if they could connect with other candidates in the process to communicate about challenges, ideas, etc.

### Exam Preparation (Videos, Practice Tests)

The Council proposed developing resources to better help candidates prepare to take the exam, including walkthrough videos of the testing site, and/or a video of the remote process, as well as practice tests that mirror the actual exam to help candidates identify gaps and challenges in their preparation. CDA participants were asked:

- How they feel about these various preparation materials and resources.

### *Benefits*

CDAs from all groups responded positively to the exam preparation resources being proposed. Non-English-speaking CDAs like the idea of videos, in particular, because visualizations are helpful to comprehend the information. Practice tests were widely liked by all groups and regarded as a top priority for many CDAs. Most CDAs acknowledged that videos would be helpful for those with test anxiety; there were also many who articulated they did not need these.

### *Considerations*

The one concern that arose about the exam preparation resources was whether the cost of preparation materials would fall on candidates and, thus, become a barrier.

### *Exam Experience (Extended Time, Remote Option)*

The Council proposed introducing a remote proctored exam option, as well as extending the amount of time for candidates to take the exam. Participants were asked:

- If they think incorporating remote exam options will improve the overall process for applicants
- If they think allowing extended exam time will positively impact applicants' experiences and completion of the process
- If they think that simplifying language and instructions for the exam is a useful tool for being more inclusive to all applicants

### *Benefits*

CDAs responded overwhelmingly positively to both options of extending the exam time and offering a remote option. CDAs talked about the challenges of finding testing sites near them and the burden of traveling long distances to take the exam and discussed the remote option alleviating these challenges. Regarding extended time, CDAs noted that taking the test causes anxiety for many, and that having more time could reduce the stress many feel of having to complete all the questions in a short period. They noted there does not seem to be a downside of doing either, and these are solutions that could reduce anxiety significantly and make the exam process more equitable. Additionally, they overwhelmingly agreed that simplifying the language of the exams would be beneficial, particularly if that will make the exam more accessible to those who have had trouble passing it.

### *Concerns*

While everyone agreed that a remote exam option would be preferable for many, there were some CDAs who raised concerns about the integrity of the exam. They want to be sure there are mechanisms in place (e.g., proctors) to prevent cheating so the exam is a true demonstration of an individual's knowledge.

### *Considerations*

Non-English-speaking CDAs like the remote option, as long as there is proper translation offered for all candidates.

## Recommendations

Based on the feedback heard during the focus groups, as well as considerations of the needs illuminated through the previous analysis of experiences, BCT recommends the Council prioritize pursuing the following ideas:

- **Electronic Portfolio:** This idea was well received by members of all groups. CDAs, PD Specialists, and partners believe this idea could improve the credentialing process significantly for many candidates, while also improving the PD Specialist review process.
- **Application Enhancements:** Focus group participants across all groups widely approved of the ideas to enhance the application. Given the feedback from many CDAs and applicants that the current application presents challenges, creating a user-friendly application experience that presents information in simple and visual ways will likely reduce significant barriers for many applicants to earning their credential.
- **Chatbots:** While there is some skepticism about the usefulness of an artificial intelligence chatbot answering questions, the primary frustration articulated by CDAs, PD Specialists, and other stakeholders has been challenges communicating with the Council. Chatbots integrated into a communication pipeline could help streamline communication processes, allowing candidates, PD Specialists, and other stakeholders to find information they need and be able to reach Council staff when necessary.
- **Verification Visit Alternatives:** It is in the Council's interest to implement at least one alternative to the current verification visit process, and therefore BCT recommends pursuing further research and analysis into both simulations and options for providing additional forms of evidence.
  - **Simulation Verification Visits:** One of the Council's primary challenges in recent years, since the start of the pandemic, particularly, has been meeting the demand for Verification Visits. CDAs, particularly those who have been through the credentialing process in recent years, feel strongly that there should be alternative options to demonstrate competencies virtually with a more efficient logistical process. Additionally, while a simulation would not capture the particularities of an individual's work environment, it might help make the verification process more equitable by having all candidates demonstrate competencies in the same, or similar, environment.
  - **Additional Forms of Evidence:** Similar to the rationale for pursuing simulations, the option of having candidates provide additional forms of evidence could help reduce the strains in the process and obstacles to earning a CDA credential for many candidates. The advantage to this option is that it could allow candidates to demonstrate their competencies in various ways, as well as capture themselves in their actual work environments. Additionally, there could be an opportunity to leverage the same technology as an electronic portfolio or find ways to link the parts of the process, if desired.
- **Auto-Assign PD Specialist:** This idea was received with mixed responses by candidates and PD Specialists but would most likely make the PD Specialist matching process more efficient and simplified for both candidates and PD Specialists. The concerns about this idea can be mitigated



by including selection criteria that would match a PD Specialist to a candidates based on more characteristics than just geography.

- **Support Coach:** Most CDAs were enthusiastic about the introduction of support coaches to the credentialing process. This role would help address some of the most significant pain points many candidates (and PD Specialists) experience, including scheduling visits, scheduling exams, and challenges with communication. Designated support coaches to whom candidates can direct questions would likely improve communication frustrations. Further, support coaches who are tracking and proactively communicating with candidates in the process, particularly those experiencing challenges, stuck at a particular point, or likely to need support based on contextual factors, could improve the experience and likelihood of completing the credentialing process for many candidates.
- **Exam Preparation Videos & Practice Exams:** For some segments of the candidates, the anxiety related to the exam proved to be the biggest hurdle to earning their CDA. CDAs across all groups were excited about the introduction of practice exams to help prepare to take the test. Videos to prepare for the process could be a valuable, and relatively simple tool to assist some of the candidates for whom the exam creates the largest barriers.
- **Remote Exams:** Not only does the exam create anxiety for many candidates, but there are also significant logistical challenges for many candidates to get to the exam. Introducing a remote exam option could help address challenges related to finding a testing site for those who might live far from one and/or do not have reliable transportation. Additionally, remote exams have become increasingly common and could be a feasible solution for the Council to offer to address a significant barrier for many.
- **Extended Time on Exams:** The time limit of the exam is one factor that creates anxiety for many candidates. The Council has also articulated that the time limit does not necessarily help assess whether a candidate knows the material and should earn their credential. Offering more time on the exam would reduce barriers for candidates who might, in turn, be more likely to succeed in earning their credential.

## Research and Analysis of Options

Given the recommendations above, BCT Partners conducted a thorough process to identify software suggestions for chatbots, learning management systems (LMS), and an ePortfolio. The Council provided basic goals and objectives in mind for their needs, which included supporting the CDA credentialing process and meeting the unique and specialized requirements of the early childhood education field.

### Objectives

The first step in this process was to define the basic requirements necessary for a credentialing system. Through the focus groups, BCT gathered information from applicants, PD Specialists, and partner organizations to help identify specific features and functionality needed to support the CDA credentialing process. This included tracking and documenting professional development hours, managing and submitting application materials, and providing resources and support for applicants.

After gathering and refining the requirements, the next step was to evaluate the different software options available and determine whether an off-the-shelf system or a custom-built system would best meet the organization's needs. In the next phase of this effort, additional requirements will need to be gathered and refined to further guide any development of software purchase for CDA credentialing process to meet the unique and specialized requirements of the early childhood education field.

BCT Partners presents learning management system (LMS) solutions to the Council to use in their credentialing services because it provides the ability to deliver, manage, and track training and professional development programs for their candidates. An LMS would provide the Council the following benefits:

- **Online course delivery:** The Council can use an LMS to deliver training and professional development programs online, making it more convenient and accessible for early childhood educators to access the courses from anywhere and at any time.
- **Tracking and reporting:** An LMS allows the Council to track and report on learners' progress and performance, which can be used to measure the effectiveness of training and to identify areas where additional support or resources may be needed. With the advent of Support Coaches, an LMS could be a system in which support coaches are assigned to candidates to track and monitor their progress.
- **Credential management:** An LMS can be integrated with other software to automate the process of credential management, such as tracking the status of credential applications, renewals, and expiration, ensuring compliance with the standards.
- **Integration with other tools:** An LMS can be integrated with other tools, such as video conferencing and assessment software, which can be used to provide a more robust and interactive learning experience for early childhood educators.
- **E-portfolio:** An LMS can also provide a platform for educators to store and share their professional development activities, which can be used as evidence of their ongoing professional growth and help them in renewing their credentials.

Overall, an LMS can provide the Council a comprehensive solution for delivering, managing, and tracking training and professional development programs, and can be integrated with other software to provide a robust and efficient platform for credentialing services.

### Considerations

There are several factors to be considered in selecting or designing software to meeting your organization's specific needs and functions. The following is a summary of primary considerations.

- **Security:** Ensuring that the software is secure is critical, as a security breach could compromise sensitive data or disrupt business operations.
- **Accessibility:** It's important to consider how the software will be accessed and used by different users, including those with disabilities.
- **Cost:** The cost of developing custom software can vary significantly depending on the complexity of the solution and the resources required.



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- **Maintenance:** Custom software will require ongoing maintenance and updates to ensure that it remains functional and secure.
- **Integration:** If the software will need to integrate with other systems or applications, this will need to be considered during the development process.
- **User experience:** Ensuring that the software is easy to use and intuitive is important for user adoption and satisfaction.
- **Scalability:** It's important to consider how the software will scale as the business grows and evolves.
- **Data management:** Ensuring that the software is able to handle and manage data effectively is critical for its functionality and performance.
- **Testing:** Thorough testing is essential to ensure that the software is reliable and performs as expected.
- **Support:** Providing ongoing support for the software will be important for addressing any issues or concerns that may arise.

### Market Analysis

The market landscape for learning management systems (LMS), chatbots, and electronic portfolios is growing rapidly. In terms of LMS, some popular options include Blackboard, Canvas, and Totara. These systems typically offer features such as course management, assignment submission, and grade tracking. Additionally, many LMS also include tools for communication and collaboration, such as discussion boards and group work spaces.

As for chatbots, some popular options include Aivo, PandoraBots, and Boost.ai. These systems generally offer features such as automated customer service, lead generation, and personalized communication. Additionally, many chatbots are able to integrate with other platforms, such as CRM and LMS systems.

In terms of electronic portfolios, some popular options include Pathbrite, PebblePad and Portfolium. These systems typically offer features that allow users to organize accomplishments and experiences into a portfolio of work by adding digital documents including certifications. Additionally, many electronic portfolio systems provide a framework to help users save records of learning, achievement, and goal tracking.

Overall, the market for these products is constantly changing and evolving, with new systems and features being developed all the time. It's important for customers to carefully research and evaluate different options before making a decision, in order to find the best fit for their needs.

### Commercial Off-the-Shelf (COTS) Systems

Once the requirements have been defined, the next step is to evaluate off-the-shelf System solutions that meet those requirements. This includes researching and comparing different solutions to determine which one best fits the needs of the Council. This step should also include a review of the vendor's experience and reputation in the industry, as well as a review of customer references and testimonials.

The following table summarizes advantages and disadvantages to using Commercial Off the Shelf Systems.





<b>Commercial Off the Shelf (COTS) Systems</b>	
<i>Advantages</i>	<i>Disadvantages</i>
<p><b>Cost:</b> Off-the-shelf systems are typically less costly to purchase and implement than custom systems.</p> <p><b>Time:</b> Off-the-shelf systems are usually ready to use out of the box, which means they can be implemented more quickly than custom systems.</p> <p><b>Support:</b> Off-the-shelf systems often come with support from the vendor, which can be helpful for troubleshooting and maintenance.</p> <p><b>Features:</b> Off-the-shelf systems typically offer a wide range of features and functionality, which can make them suitable for a variety of learning contexts. Often, feature requests can be made to vendors, who may develop and upgrade the system without incurring additional costs.</p> <p><b>Proven technology:</b> Off-the-shelf systems have been tested and proven in a variety of settings, so you can be confident that the technology is reliable and effective.</p> <p><b>User Experience:</b> Most off-the-shelf systems are designed with user-friendliness in mind, making it easy for learners and trainers to use the system.</p>	<p><b>Flexibility:</b> Off-the-shelf systems are generally not as customizable as a custom system, which means that you may have to work within the constraints of the system rather than being able to tailor it specifically to your needs.</p> <p><b>Integration:</b> Off-the-shelf systems may not integrate seamlessly with other systems or tools that the organization uses, such as HR or CRM systems.</p> <p><b>Ongoing fees:</b> Most off-the-shelf systems require ongoing fees for things like support, updates, and maintenance, which can add up over time.</p> <p><b>Lack of control:</b> With an off-the-shelf system, you are reliant on the vendor for updates, maintenance, and support, which means that you may not have as much control over the system as you would with a custom system.</p> <p><b>Scalability:</b> Off-the-shelf systems may not scale well as the organization grows, requiring additional licenses or upgrades to accommodate more users or features.</p>

### Custom System

In addition to considering advantages and disadvantages to a commercial off the shelf system, it valuable to consider the advantages and disadvantages of design and developing a custom system.

For a custom system of this nature, a human-centered design approach is ideal. Human-centered design methodology focuses on understanding the needs and wants of the end-users of a product or service. When developing a custom software solution using this approach, it may require an extended timeframe to complete because the process involves extensive research, testing, and iteration.

The process typically begins with conducting user research to understand the needs, behaviors, and motivations of the end-users. This research is used to identify pain points and opportunities for improvement in the current system, and to develop a set of user requirements for the new software.

Next, multiple design concepts and prototypes are created that address user requirements. These concepts and prototypes are then tested with users to gather feedback and identify areas for improvement. Based on the feedback, the design team iterates on the design, refining and testing it until it meets the needs of the end-users.

The following table summarizes advantages and disadvantages of developing a custom system.



Custom System	
<i>Advantages</i>	<i>Disadvantages</i>
<p><b>Customization:</b> A custom system can be tailored to meet the specific needs and preferences of the organization, providing greater flexibility and control.</p> <p><b>Control:</b> With a custom system, you have full control over the system and can make any changes or updates that you see fit.</p> <p><b>Integration:</b> A custom system can be designed to integrate seamlessly with other systems and tools used by the organization.</p> <p><b>Scalability:</b> A custom system can be built to scale as the organization grows, eliminating the need for additional licenses or upgrades.</p>	<p><b>Cost:</b> Building a custom system can be more expensive than purchasing a COTS system, due to the high upfront cost of development and ongoing maintenance.</p> <p><b>Time:</b> Developing a custom system can take longer than implementing an off-the-shelf system, due to the design and development process. The entire process can be time-consuming, as it may require multiple rounds of research, testing, and iteration before a final design is reached. Additionally, the process may require collaboration with multiple resources, such as internal and external stakeholders, developers, and subject matter experts.</p> <p><b>Support:</b> Custom systems may not come with vendor support, meaning the organization will need to rely on in-house resources or third-party support for maintenance and troubleshooting.</p>

### Recommendation

Ultimately, the decision to use an off-the-shelf solution or develop a custom system will depend on the Council's specific needs, requirements, and budget. If rapid implementation and budget considerations are a priority, an off-the-shelf solution may be the right choice. If it is determined that a highly customized system is preferred and the Council are willing to invest the time and money necessary to develop it, a custom solution may be a better fit.

The following table compares commercial off the shelf software to custom software based on the key factors to consider (listed above).

Criteria	Commercial Off-the-shelf Software	Custom Software
Security	May have built-in security features	Can be tailored to specific security needs
Accessibility	Accessibility concerns addressed by vendor	Additional considerations must be taken to ensure accessibility requirements are met



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Cost	Typically lower upfront cost	May have higher development costs, but lower long-term costs
Maintenance	Vendor typically handles updates and maintenance	In-house team responsible for updates and maintenance
Integration	May integrate easily with other off-the-shelf software	Can be tailored to integrate with specific systems
User experience	May have a generic user interface or functions not useful to a user	Can be designed for optimal user experience
Scalability	May be limited in scalability options	Can be designed to scale as needed
Data management	May have limited data management options	Can be tailored for specific data management needs
Testing	May have limited testing options	Can be thoroughly tested for specific use cases
Support	Vendor support typically available	In-house team responsible for support

## System Comparisons

In addition to general considerations to guide decision making about whether to use a commercial off the shelf software system or develop a customized software system, BCT has done research on specific COTS options. The following tables provide information about possible systems the Council should consider for learning management systems, ePortfolios, virtual simulators, and chatbots. While these lists are not exhaustive, they provide information about specific systems that might meet the Council's needs, along with the availability of relevant features.

Learning Management Systems			
Company Name:	Blackboard	Canvas	Totara
Website:	<a href="http://www.blackboard.com">www.blackboard.com</a>	<a href="http://www.instructure.com/canvas">www.instructure.com/canvas</a>	<a href="http://www.totara.com">www.totara.com</a>
From the developer	A learning management system (LMS) used by educational institutions and businesses to deliver and manage online courses and training programs.	An LMS that provides a simple, user-friendly interface and a wide range of tools for creating and delivering online content.	An open-source LMS that is built on top of Moodle, a popular open-source LMS, and is designed for use by businesses and organizations.
Relevant features			
Customization options	Yes	Yes	Yes
Mobile compatibility	Yes	Yes	Yes
Integrations	Yes	Yes	Yes
Analytics and Reporting	Yes	Yes	Yes
Video Conferencing	Yes	Yes	Yes
Accessibility	Yes	Yes	Yes
Support	Yes	Yes	Yes
SCORM Compliant	Yes	Yes	Yes

ePortfolio				
Company Name:	Canvas Credentials	Pathbrite	PebblePad	PortfolioGen
Website:	<a href="https://www.instructure.com/en-gb/schools/products/canvas/canvas-credentials-digital-badges">https://www.instructure.com/en-gb/schools/products/canvas/canvas-credentials-digital-badges</a>	<a href="http://www.pathbrite.com">www.pathbrite.com</a>	<a href="http://www.pebblepad.co.uk">www.pebblepad.co.uk</a>	<a href="http://www.portfoliogen.com">www.portfoliogen.com</a>
Description from the developer	Ensure your educators have the skills and credentials needed to produce the best outcomes for students in your school. Start tracking skills and certifications, supporting professional development, and evaluating progress today.	Pathbrite is an easy way for people to showcase their abilities and achievements via beautiful and compelling portfolios. Pathbrite allows you to go over and beyond with your digital portfolio, away from the traditional one-dimensional presentations. It works for other documents such as job applications, resumes, or academic presentations. It allows you to break free and express yourself in your submissions; create	PebblePad is designed to act as an electronic portfolio (e-portfolio). It is a Personal Learning Space used in diverse learning contexts such as schools, colleges, universities, and professional bodies. It is useful for students, teachers, and testers for personal development planning; continuing professional development; and learning, teaching, and assessment. PebblePad was created with everything set to revolve around the student. It provides a framework to help users save records of learning, achievement, and goals. It also has a reflective structure underlining all its core elements.	PortfolioGen gives professionals, teachers, students and educators the tools needed to highlight and demonstrate their skills in a modern and unique way that goes beyond traditional binders.  Developed by teachers, PortfolioGen makes it easy to create a customized online portfolio to showcase and share your skills, education, work experience and achievements, while providing an opportunity for reflection and continued professional growth.



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		and edit your digital portfolios to reflect your achievements, learning, and studies.		
<b>Relevant features</b>				
Cloud-based platform	Yes	Yes	Yes	Yes
Mobile app availability	Yes	Yes	Yes	No
Customizable templates	Yes	Yes	Yes	Yes
Multimedia support	Yes	Yes	Yes	Yes
Collaboration and sharing capabilities	Yes	Yes	Yes	Yes
Analytics and tracking	Yes	Yes	Yes	Yes
Integration with LMS	Yes	Yes	Yes	Yes
Accessibility features	Yes	Yes	Yes	Yes

Virtual Simulators					
Company Name:	Simula8	Simio	Vensim	Arena	FlexSim
Website:	<a href="http://www.simul8.com">www.simul8.com</a>	<a href="http://www.simio.com">www.simio.com</a>	<a href="http://www.vensim.com">www.vensim.com</a>	<a href="http://www.rockwellautomation.com">www.rockwellautomation.com</a>	<a href="http://www.flexsim.com">www.flexsim.com</a>
Description from the developer	Simul8 is the most intuitive and fastest simulation engine on the market. Before Simul8, simulation software was costly, resource-hungry and time-intensive, Simul8 makes simulation accessible to all.	Simulation and scheduling solution designed to help businesses assess, predict and manage processes with designing, planning, optimization and other tools.	Analysts and researchers with hard problems to solve in business, public policy and academia.	Designed for businesses of all sizes in manufacturing, supply chain, healthcare, mining, and other industries, it is a simulation tool that provides agent-based modeling, reporting, and more.	FlexSim was designed to make simulation modeling and analysis easier and more powerful for engineers and decision makers in manufacturing, warehousing, supply chain, logistics, and healthcare.
Relevant Features					
3D Imaging	Yes	Yes	No	Yes	Yes
Agent-Based Modeling	Yes	Yes	No	Yes	Yes
Continuous Modeling	Yes	Yes	Yes	Yes	Yes
Design Analysis	Yes	Yes	No	Yes	Yes
Direct Manipulation	Yes	Yes	No	Yes	Yes
Discrete Event Modeling	Yes	Yes	No	Yes	Yes
Dynamic Modeling	Yes	Yes	Yes	Yes	Yes
Graphical Data Presentation	Yes	Yes	No	Yes	Yes
Industry Specific Database	Yes	Yes	No	Yes	Yes



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Monte Carlo Simulation	Yes	Yes	Yes	Yes	Yes
Motion Modeling	Yes	No	No	Yes	No
Presentation Tools	Yes	Yes	No	Yes	Yes
Stochastic Modeling	Yes	No	Yes	Yes	No
Turbulence Modeling	No	No	No	No	No
<b>Support</b>					
Email/Help Desk	Yes	Yes	Yes	No	Yes
FAQs/Forum	Yes	Yes	Yes	No	Yes
Knowledge Base	Yes	No	No	No	Yes
Phone Support	Yes	Yes	Yes	No	Yes
24/7 (Live Rep)	No	Yes	Yes	Yes	No
Chat	Yes	No	Yes	No	Yes
<b>Training</b>	Yes	Yes	Yes	Yes	Yes
In Person	Yes	Yes	Yes	Yes	Yes
Live Online	Yes	Yes	Yes	Yes	Yes
Webinars	Yes	Yes	No	Yes	No
Documentation	Yes	Yes	Yes	Yes	Yes
Videos	Yes	No	No	No	Yes

Chatbots			
Company Name:	Aivo	PandoraBots	Boost.AI
Website:	<a href="http://www.aivo.co">www.aivo.co</a>	<a href="http://www.pandorabots.com">www.pandorabots.com</a>	<a href="http://www.boost.ai">www.boost.ai</a>
Description from the developer	Aivo's Conversational AI-powered suite understands natural conversations, connects to your tech stack, and delivers clients exactly what they're looking for.	Our robust, feature-rich, self-service IDE empowers IT teams to build internally, enabling end-to-end management and ownership of your codebase and customer data. Professional Services, including custom chatbot development, are also available for Enterprises via our internal team or network of third-party PS Implementation Partners.	Probably the world's most intuitive software for managing virtual agents. Design delightful interactions. Integrate them with existing solutions. Train the virtual agent's AI to automate them. Do it all without coding.
Relevant Features			
AI/Machine Learning	Yes	Yes	Yes
Augmented Analytics	Yes	Yes	No
Automated Responses	Yes	Yes	No
Automated Routing	No	Yes	No
Chatbot	Yes	Yes	Yes
Code-free Development	Yes	No	Yes
Customer Support	Yes	Yes	No
Customizable Branding	N/A	N/A	Yes
For Sales/Marketing	Yes	Yes	No
Language Detection	Yes	Yes	No
Natural Language Processing	Yes	Yes	Yes
Pre-Configured Bot	Yes	Yes	Yes
Query Suggestions	Yes	Yes	No
Transfers/Routing	Yes	Yes	No



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Virtual Assistant	Yes	Yes	No
Multi-lingual	Yes	Yes	Yes

## Appendix A BCT PARTNERS: Focus Group Protocol- CANDIDATES

Strategy: Conduct a 90-minute focus group for the Council for Professional Recognition to learn about attitudes and responses to proposed changes in the CDA process.

### **FOCUS GROUP Interview Guide**

Thank you for offering your time and insights today, my name is [XXX] and I work at BCT Partners. BCT Partners is one of the top 100 largest Black-owned enterprises in the U.S. We have been nationally recognized by Forbes as one of the nation's top 200 management consulting firms and by Manage HR magazine as one of the top 10 DEI firms in the U.S. The Council for Professional Recognition has asked BCT to help them to be more successful in understanding responses and attitudes towards proposed changes to the CDA credentialing process. Today we hope to enlist your help to better understand how to build a better experience for every applicant involved in this process.

As individuals who have undergone the credentialing process, you have a unique perspective that could help the Council for Professional Recognition achieve these goals and work towards improvement of the CDA process. You were invited to participate in this confidential focus group to share your direct and candid feedback about your thoughts on the proposed changes and how they will impact the process overall.

Today, I will share with you the ideas the Council is considering to improve the credentialing process experience for all applicants. These ideas were generated after an intensive review and analysis of data from 1) the Council's administrative system, 2) surveys of CDAs, PD Specialists, applicants who did not complete the process, and other stakeholders, 3) and focus groups and interviews with a wide range of applicants, PD Specialists, and other stakeholders.

I will ask you to share your perceptions of the proposed ideas, and how you think they might improve the credentialing process for future applicants. Some of these questions will be tailored to various parts of the CDA credentialing process while others may focus more generally on the applicant experience as a whole. Your responses will be confidential and will only be shared in aggregate, so please be as candid and forthcoming as you can. There will be no penalty or repercussions for what you share in this interview. Our final report will only provide summaries and anecdotes from what was learned.

This means:

- (1) You can decline to answer any questions or leave at any time
- (2) We will not connect your name with what was said in any written reports

Before we begin, the Council has asked that anyone participating in a focus group sign a Non-Disclosure Agreement. This is because we are still in the phase of gathering feedback, and we do not want to create confusion across the CDA network of people thinking the process is changing in ways that it might not be. Please take a moment to review the NDA document, sign it, and send it to [aalfred@bctpartners.com](mailto:aalfred@bctpartners.com) [put in chat].

I would like to let you know that we'll be recording this call. The recording is for note taking purposes only and will not be shared anyone outside this research team. Please confirm that you consent to being recorded.

START RECORDING.

### **Training**

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## COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA PROCESS REPORT

We received a lot of feedback from candidates about the range of training quality they received while preparing for the CDA. Given this, the ideas the Council generated were to standardize trainings, particularly by requiring that any training program accepted by the Council to use specific resources (e.g., Essentials).

1. Do you think it's useful to create universal standards for training that include requiring specific resources to be used by trainers?
2. Are there any barriers or obstacles you think this change would create? Are there any other concerns you might have about implementing these changes?
3. Is there anything that excites you about it?

*[Facilitator Note: the training we're referring to relates to the 120 hours in the event people have questions about the word training]*

### **Portfolio**

We saw in the data that it's crucial to have a portfolio assessment that allows candidates to demonstrate competencies. We also learned it is important to include perspectives of people who can speak to the candidate's competencies in the credentialing process, and that the reflective process is key to the success of many candidates. Additionally, we heard from PD Specialists that the review process of the portfolio can be challenging with a physical portfolio. Given all of this, the ideas the Council generated were: 1) Create an electronic portfolio option for candidates to select that would allow candidates to have a more interactive portfolio experience and include inputs from more people who can attest to their competencies; 2) Incorporate a reflective aspect of the portfolio to help candidates think deeply about their own practice; 3) Re-introduce the advisor role to support individuals in the process of preparing to apply for their CDA.

*[Facilitator notes: If there are questions about the advisor role, you can explain this would be a mentor for the applicant before applying, while preparing for the CDA process. This would likely be someone completely outside the Council who can provide an individual with guidance and support as they're preparing for the credentialing process. In the past, this was someone in the individual's community that they identified. The advisor could be like that again or could include virtual advisors from the CDA network in other communities. The electronic portfolio option would not be required, but something candidates could select if they want to.]*

4. What do you think about having the option of an electronic portfolio that could be interactive?
5. Do you think allowing more input from more people will be helpful to this process?
6. Would you find it helpful to incorporate more reflective aspects of the credentialing process (this includes creating a space to think deeply about personal practices)?
7. An electronic portfolio would likely involve a free login to a site separate from your registration and application. What do you see as advantages or disadvantages to this?



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8. What are some important considerations for the advisor role to make it valuable for potential CDA applicants? (For example, location? Availability? Experience? Access? Process to identify someone?)
9. What concerns, if any, do you have about finding an advisor? Would an advisor need to be someone in an individual's community, or could they be elsewhere and support someone virtually?

### **Application**

We learned in the data and feedback that ease of application is an essential component to earning the credential. Many candidates articulated challenges with the application, including finding it confusing and cumbersome. Additionally, they found that it was challenging to get support with application related questions, including where they are in the process and what to do next. To address these challenges, the Council generated the following ideas: 1) Build in video instructions and description of the full credentialing process; 2) Simplify language and instructions in the application; 3) Use graphic/visual representation to show applicants where they are in the process 4) Introduce chatbots to answer commonly asked questions immediately (24/7).

10. What do you think of each of these ideas?
11. Do you think these changes to the application would help individuals navigate the process more easily?
12. Is there anything the Council should consider if they make any of these changes?

### **Verification Visit**

We heard that there is an increased need for virtual visit options, and that there are frequent challenges with finding a PD Specialist and scheduling Verification Visits. Given all of this, the Council has generated the following ideas: 1) Explore the use of classroom simulations to collect evidence of candidates' competencies as an option; 2) Include videos, diary entries, and other forms of submission to provide additional evidence of competencies; 3) Introduce an app for candidates to communicate with a PD Specialist; 4) Introduce an option for a candidate to work with a support coach for scheduling help with verification visit; 5) Auto-assign a PD Specialist to a candidate, or provide a list of several PD Specialists in the area for a candidate to contact; 6) Have access to chatbots for frequently asked questions to be answered immediately at any time. Additionally, the Council has already made virtual Verification Visits a permanent option.

*[Facilitator Notes: 1) A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the Verification Visit, specifically, a support coach could help an applicant navigate challenges related to scheduling and finding a PD Specialist.*

*[Facilitator notes: 2) There might be questions and concerns related to the simulation idea; remind participants this group is intended to collect feedback about the ideas and understand perceptions and concerns, as well as identify which ideas should be made a reality. We want to understand their thoughts about it, what would make it work and what concerns them. Mentioning it does not mean it is definitely happening. The following can be used as an example of what this process would look like: The Council would create an online virtual classroom where the teacher is presented with several scenarios using*



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*avatars. They would move through the program, which documents the decisions the candidate makes according to the items on the CSI (Comprehensive Scoring Instrument). A score is then automatically generated.]*

13. What do you think about the idea of expanding how the Council does virtual Verification Visits? (This includes having more simulations and additional ways to provide evidence of competency.)

14. Do you foresee any challenges in allowing applicants to show competency in different ways? What kinds of complications come to mind? Is there any method you can think of that you think would be well-received or used most often? Why?

15. If there was an app for communication, what would make it useful?

16. What would make a support coach valuable for helping someone through the Verification Visit process?

### **Exam**

We found that the exam experience created barriers for applicants. Timed testing creates anxiety for many applicants. Many folks also have challenges accessing testing sites, both because of location and transportation barriers, and because many testing sites are perceived as intimidating and uninviting, impacting candidates' performance. The Council has generated the following ideas to address these barriers: 1) Introduce a remote exam option; 2) Extend the amount of time for candidates to take the exam; 3) Offer preparation for the exam experience, including walk through videos of the testing site, video of the remote process; 4) Offer practice tests that mirror the actual exam to help candidates identify gaps and challenges in their preparation; 5) Offer option to work with a support coach to help schedule the exam; 6) Have access to chatbots for frequently asked questions to be answered immediately at any time.

*[Facilitator Note: A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the exam, specifically, a support coach could help an applicant navigate challenges related to scheduling, finding a testing site, and figuring out the remote exam process.]*

17. Do you think incorporating remote exam options will improve the overall process for applicants?

18. Do you think allowing extended exam time will positively impact applicants' experiences and completion of the process?

19. Do you feel that simplifying language and instructions for the exam is a useful tool for being more inclusive to all applicants?

20. How do you feel about including preparation materials for the exam such as practice tests, providing virtual walk-throughs of testing sites, and videos with explanations of the remote process?





21. What would make a support coach valuable for helping someone through the exam process?

**General Questions**

22. If you had to choose just three of the above-mentioned ideas to bring to life, which would they be?

23. Do you think adding chatbots to answer commonly asked questions alongside other digital tools, and/or support coaches, would help alleviate most of the communication issues throughout the process? What would make these tools most helpful?

24. Do you see any major difficulties or obstacles to improvement with these proposed changes? Are there any logistical or individual concerns or issues that you think may have been overlooked?

## Appendix B BCT PARTNERS: Focus Group Protocol- PD Specialist

Strategy: Conduct a 90-minute focus group for the Council for Professional Recognition to learn about attitudes and responses to proposed changes in the CDA process.

### **FOCUS GROUP Interview Guide**

Thank you for offering your time and insights today, my name is [XXX] and I work at BCT Partners. BCT Partners is one of the top 100 largest Black-owned enterprises in the U.S. We have been nationally recognized by Forbes as one of the nation's top 200 management consulting firms and by Manage HR magazine as one of the top 10 DEI firms in the U.S. The Council for Professional Recognition (the Council) has asked BCT to help them to be more successful in understanding responses and attitudes towards proposed changes to the CDA credentialing process. Today we hope to enlist your help to better understand how to build a better experience for every applicant involved in this process.

As PD Specialists who have been part of the credentialing process, you have a unique perspective that could help the Council achieve these goals and work towards improvement of the CDA process. You were invited to participate in this confidential focus group to share your direct and candid feedback about your thoughts on the proposed changes and how they will impact the process overall.

Today, I will share with you the ideas the Council is considering to improve the credentialing process experience for all applicants. These ideas were generated after an intensive review and analysis of data from 1) the Council's administrative system; 2) surveys of CDAs, PD Specialists, applicants who did not complete the process, and other stakeholders; and 3) focus groups and interviews with a wide range of applicants, PD Specialists, and other stakeholders.

I will ask you to share your perceptions of the proposed ideas, and how you think they might improve the credentialing process for future applicants. Some of these questions will be tailored to various parts of the CDA credentialing process while others may focus more generally on the credential experience as a whole. Your responses will be confidential and will only be shared in aggregate, so please be as candid and forthcoming as you can. There will be no penalty or repercussions for what you share in this interview. Our final report will only provide summaries and anecdotes from what was learned.

This means:

- (1) You can decline to answer any questions or leave at any time
- (2) We will not connect your name with what was said in any written reports

Before we begin, I would like to confirm that everyone received the Non-Disclose Agreement I sent yesterday, and has returned it. The Council is asking anyone participating in one of these focus groups to sign it because we are still in the phase of gathering feedback, and we do not want to create confusion across the CDA network of people thinking the process is changing in ways that it might not be. Please take a moment to review the NDA document, sign it, and send it back to me at to [aalfred@bctpartners.com](mailto:aalfred@bctpartners.com).



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I would like to let you know that we'll be recording this call. The recording is for note taking purposes only and will not be shared anyone outside this research team. Please confirm that you consent to being recorded.

[START RECORDING.]

### **Training**

We received a lot of feedback from candidates about the range of training quality they received while preparing for the CDA. (Note this relates to the 120 hours in the event people have questions about the word training.) The ideas the Council generated were to standardize trainings, particularly by requiring that any training program accepted by the Council to use specific resources (e.g., *Essentials*).

1. Do you think it's useful to create universal standards for training that include requiring specific resources to be used by trainers?
2. Are there any barriers or obstacles you think this change would create? Are there any other concerns you might have about implementing these changes?
3. Is there anything that excites you about it?

### **Portfolio**

We saw in the data that it's crucial to have a portfolio assessment that allows candidates to demonstrate competencies. We also learned it is important to include perspectives of people who can speak to the candidate's competencies in the credentialing process, and that the reflective process is key to the success of many candidates. Additionally, we heard from PD Specialists that the review process of the portfolio can be challenging with a physical portfolio. Given all of this, the ideas the Council generated were: 1) Create an electronic portfolio option that would allow candidates to have a more interactive portfolio experience and include inputs from more people who can attest to their competencies; 2) Incorporate a reflective aspect of the portfolio to help candidates think deeply about their own practice; 3) Re-introduce the advisor role to support individuals in the process of preparing to apply for their CDA.

*[Facilitator note: 1) The current idea would give applicants the opportunity to upload a PDF of their portfolio for PD Specialist to review ahead of verification visit should the candidate select to use the electronic format.*

*2) Advisor Role: This would be a mentor for the applicant before applying, while preparing for the CDA process. This would likely be someone completely outside the Council who can provide an individual with guidance and support as they're preparing for the credentialing process. In the past, this was someone in the individual's community that they identified. The advisor could be like that again or could include virtual advisors from the CDA network in other communities.]*

4. What do you think about an electronic portfolio format?
5. How would an electronic portfolio affect the PD Specialist process for reviewing it? What would you envision this looking like? What would make it useful to have an electronic version of the portfolio?



6. Do you think allowing more input from more people will be helpful in verifying a candidate's competencies?
7. Would you find it helpful for the reflective dialogue for candidates to incorporate more reflection in the portfolio process (this includes creating a space to think deeply about personal practices)?
8. How do you think the addition of an advisor might impact the PD Specialist role?

### **Application**

We heard from many people about challenges with the application, including finding it confusing and cumbersome. Additionally, many people reported that it was challenging to get support with application related questions, including where they are in the process and what to do next. To address these challenges, the Council generated the following ideas: 1) Build in video instructions and description of the full credentialing process; 2) Simplify language and instructions in the application; 3) Use graphic/visual representation to show applicants where they are in the process; 4) Introduce chatbots to answer commonly asked questions immediately (24/7).

*[Facilitator note: Application changes would be included in both the candidate application as well as the PD Specialist application]*

9. What do you think of each of these ideas?
10. Do you think these changes to the application would help individuals navigate the process more easily?
11. Is there anything the Council should consider if they make any of these changes?

### **Verification Visit**

The data and surveys showed us that the Verification Visit experience a candidate has with a PD Specialist can vary, and feelings of getting a fair assessment of competencies and having a reflective dialogue that focuses on strengths and areas of growth are keys to success for many candidates. We also heard that there is an increased need for virtual visit options, and that there are frequent challenges with finding a PD Specialist and scheduling Verification Visits. Given all of this, the Council has generated the following ideas: 1) Introduce an app for PD Specialists to communicate directly with candidates and Council staff; 4) Introduce an option for a candidate to work with a support coach for scheduling help with verification visit; 5) Auto-assign a PD Specialist to a candidate, or provide a list of several PD Specialists in the area for a candidate to contact; 6) Real-time note taking input into application/administrative system (e.g., YourCouncil); 7) Have access to chatbots for frequently asked questions to be answered immediately at any time. Additionally, the Council has already made virtual Verification Visits a permanent option.

12. What do you think can help make virtual visits successful?
13. How would you feel about verifying competencies through additional evidence, e.g., videos, diary entries?



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COUNCIL FOR PROFESSIONAL RECOGNITION – REIMAGINING THE CDA PROCESS REPORT

14. If there was an app for communication, what would make it useful? Is it needed? Would you use it? What are the barriers? Is there better way to have real time contact with Council and/or candidates?

15. What would you want a tool to input your notes directly into the administrative system to look like?

16. How could the addition of a support coach help PD Specialists? Are there any challenges you foresee?

**General Questions**

17. If you had to choose just three of the above-mentioned ideas to bring to life, which would they be?

18. Do you think adding chatbots to answer commonly asked questions alongside other digital tools, like a communication app, would help alleviate most of the communication issues throughout the process? How do you envision PD Specialists would use these tools?

19. What major difficulties or obstacles to improvement may exist with these proposed changes? Are there any logistical or individual concerns or issues that you think may have been overlooked?

## Appendix C BCT PARTNERS: Focus Group Protocol- Stakeholders

Strategy: Conduct a 60-minute focus group for the Council for Professional Recognition to learn about attitudes and responses to proposed changes in the CDA process.

### FOCUS GROUP Interview Guide

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As individuals who support people going into the credentialing process, you have a unique perspective that could help the Council achieve these goals and work towards improvement of the CDA process. You were invited to participate in this confidential focus group to share your direct and candid feedback about your thoughts on the proposed changes and how they will impact the process overall.

Today, I will share with you the ideas the Council is considering to improve the credentialing process experience for all applicants. These ideas were generated after an intensive review and analysis of data from 1) the Council's administrative system; 2) surveys of CDAs, PD Specialists, applicants who did not complete the process, and other stakeholders; and 3) focus groups and interviews with a wide range of applicants, PD Specialists, and other stakeholders.

I will ask you to share your perceptions of the proposed ideas, and how you think they might improve the credentialing process for future applicants. Some of these questions will be tailored to various parts of the CDA credentialing process while others may focus more generally on the applicant experience as a whole. Your responses will be confidential and will only be shared in aggregate, so please be as candid and forthcoming as you can. There will be no penalty or repercussions for what you share in this interview. Our final report will only provide summaries and anecdotes from what was learned.

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I would like to let you know that we'll be recording this call. The recording is for note taking purposes only and will not be shared anyone outside this research team. Please confirm that you consent to being recorded.

START RECORDING.

### **Training**

We received a lot of feedback from candidates about the range of training quality they received while preparing for the CDA. Given this, the ideas the Council generated were to standardize trainings, particularly by requiring that any training program accepted by the Council to use specific resources (e.g., *Essentials*).

1. Do you think it's useful to create universal standards for training that include requiring specific resources to be used by trainers?
2. What would need to happen to make this transition successful?
3. Are there any barriers or obstacles you think this change would create? Are there any other concerns you might have about implementing these changes?
4. Is there anything that excites you about it?

*[Facilitator Note: the training we're referring to relates to the 120 hours in the event people have questions about the word training.]*

### **Portfolio**

We saw in the data that it's crucial to have a portfolio assessment that allows candidates to demonstrate competencies. We also learned it is important to include perspectives of people who can speak to the candidate's competencies in the credentialing process, and that the reflective process is key to the success of many candidates. Additionally, we heard from PD Specialists that the review process of the portfolio can be challenging with a physical portfolio. Given all of this, the ideas the Council generated were: 1) Create an electronic portfolio option for candidates to select that would allow candidates to have a more interactive portfolio experience and include inputs from more people who can attest to their competencies; 2) Incorporate a reflective aspect of the portfolio to help candidates think deeply about their own practice; 3) Re-introduce the advisor role to support individuals in the process of preparing to apply for their CDA.

*[Facilitator notes: If there are questions about the advisor role, you can explain this would be a mentor for the applicant before applying, while preparing for the CDA process. This would likely be someone completely outside the Council who can provide an individual with guidance and support as they're preparing for the credentialing process. In the past, this was someone in the individual's community that they identified. The advisor could be like that again or could include virtual advisors from the CDA network in other communities.*

*The electronic portfolio option would not be required, but something candidates could select if they want to.]*

5. What do you think about having the option of an electronic portfolio that could be interactive?
6. Do you think allowing more input from more people will be helpful to this process?
7. Do you think adding an electronic portfolio option would change the way you support candidates in their preparation for the credentialing process?





8. What are some important considerations for the advisor role to make it valuable for potential CDA applicants? (For example, location? Availability? Experience? Access? Process to identify someone?)
9. What concerns, if any, do you have (re)introducing an advisor? Would an advisor need to be someone in an individual's community, or could they be elsewhere and support someone virtually?

### **Application**

We learned in the data and feedback that ease of application is an essential component to earning the credential. Many candidates articulated challenges with the application, including finding it confusing and cumbersome. Additionally, they found that it was challenging to get support with application related questions, including where they are in the process and what to do next. To address these challenges, the Council generated the following ideas: 1) Build in video instructions and description of the full credentialing process; 2) Simplify language and instructions in the application; 3) Use graphic/visual representation to show applicants where they are in the process; 4) Introduce chatbots to answer commonly asked questions immediately (24/7).

10. What do you think of each of these ideas?
11. Do you think these changes to the application would help individuals navigate the process more easily?
12. Is there anything the Council should consider if they make any of these changes?

### **Exam**

We found that the exam experience created barriers for applicants. Timed testing creates anxiety for many applicants. Many folks also have challenges accessing testing sites, both because of location and transportation barriers, and because many testing sites are perceived as intimidating and uninviting, impacting candidates' performance. The Council has generated the following ideas to address these barriers: 1) Introduce a remote exam option; 2) Extend the amount of time for candidates to take the exam; 3) Offer preparation for the exam experience, including walk through videos of the testing site, video of the remote process; 4) Offer practice tests that mirror the actual exam to help candidates identify gaps and challenges in their preparation; 5) Offer option to work with a support coach to help schedule the exam 6) Have access to chatbots for frequently asked questions to be answered immediately at any time.

*[Facilitator Note: A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the exam, specifically, a support coach could help an applicant navigate challenges related to scheduling, finding a testing site, figuring out the remote exam process.]*

1. Do you think incorporating remote exam options will improve the overall process for applicants?
2. Do you think allowing extended exam time will positively impact applicants' experiences and completion of the process?



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3. Do you feel that simplifying language and instructions for the exam is a useful tool for being more inclusive to all applicants?
4. How do you feel about including preparation materials for the exam such as practice tests, providing virtual walk-throughs of testing sites, and videos with explanations of the remote process?
5. What would make a support coach valuable for helping someone through the exam process?

### **Verification Visit**

We heard that there is an increased need for virtual visit options, and that there are frequent challenges with finding a PD Specialist and scheduling Verification Visits. Given all of this, the Council has generated the following ideas: 1) Create a simulation of a classroom to demonstrate competencies, rather than doing so in an actual classroom; 2) Include videos, diary entries, and other forms of submission to provide additional evidence of competencies; 3) Introduce an app for candidates to communicate with a PD Specialist; 4) Introduce an option for a candidate to work with a support coach for scheduling help with Verification Visit; 5) Auto-assign a PD Specialist to a candidate, or providing a list of several PD Specialists in the area for a candidate to contact; 6) Have access to chatbots for frequently asked questions to be answered immediately at any time. Additionally, the Council has already made virtual Verification Visits a permanent option.

*[Facilitator Notes: 1) A support coach would be someone who helps track progress of applicants once they apply. Applicants would have a person at the Council to reach out to with concerns related to credentialing process. For the Verification Visit, specifically, a support coach could help an applicant navigate challenges related to scheduling, finding a PD Specialist.]*

*[Facilitator notes: 2) There might be questions and concerns related to the simulation idea; remind participants this group is intended to collect feedback about the ideas and understand perceptions and concerns, as well as identify which ideas should be made a reality. We want to understand their thoughts about it, what would make it work and what concerns them. Mentioning it does not mean it is definitely happening.]*

6. What do you think about the idea of expanding how the Council does virtual Verification Visits? (This includes having more simulations and additional ways to provide evidence of competency.)
7. Do you foresee any challenges in allowing applicants to show competency in different ways? What kinds of complications come to mind? Is there any method you can think of that you think would be well-received or used most often? Why?
8. If there was an app for communication, what would make it useful?
9. What would make a support coach valuable for helping someone through the verification visit process?

### **General Questions**

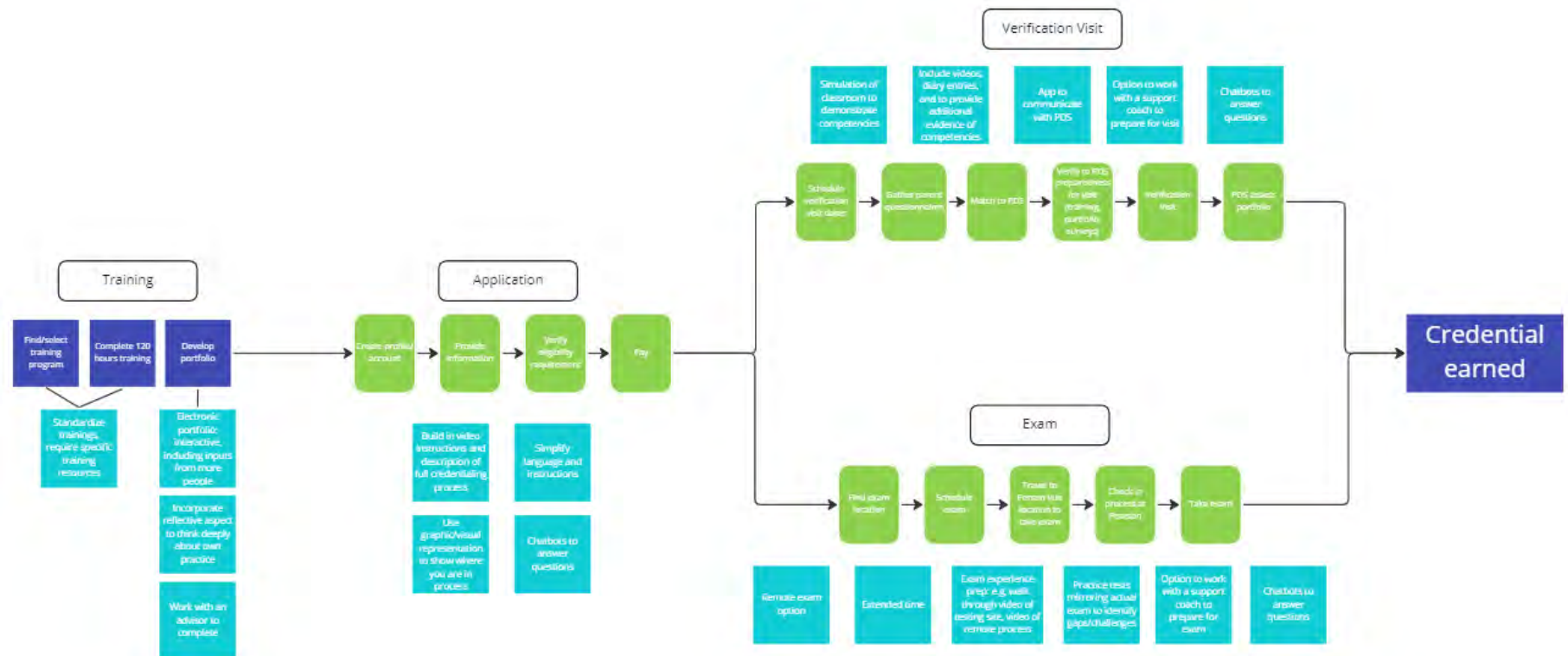
10. If you had to choose just three of the above-mentioned ideas to bring to life, which would they be?



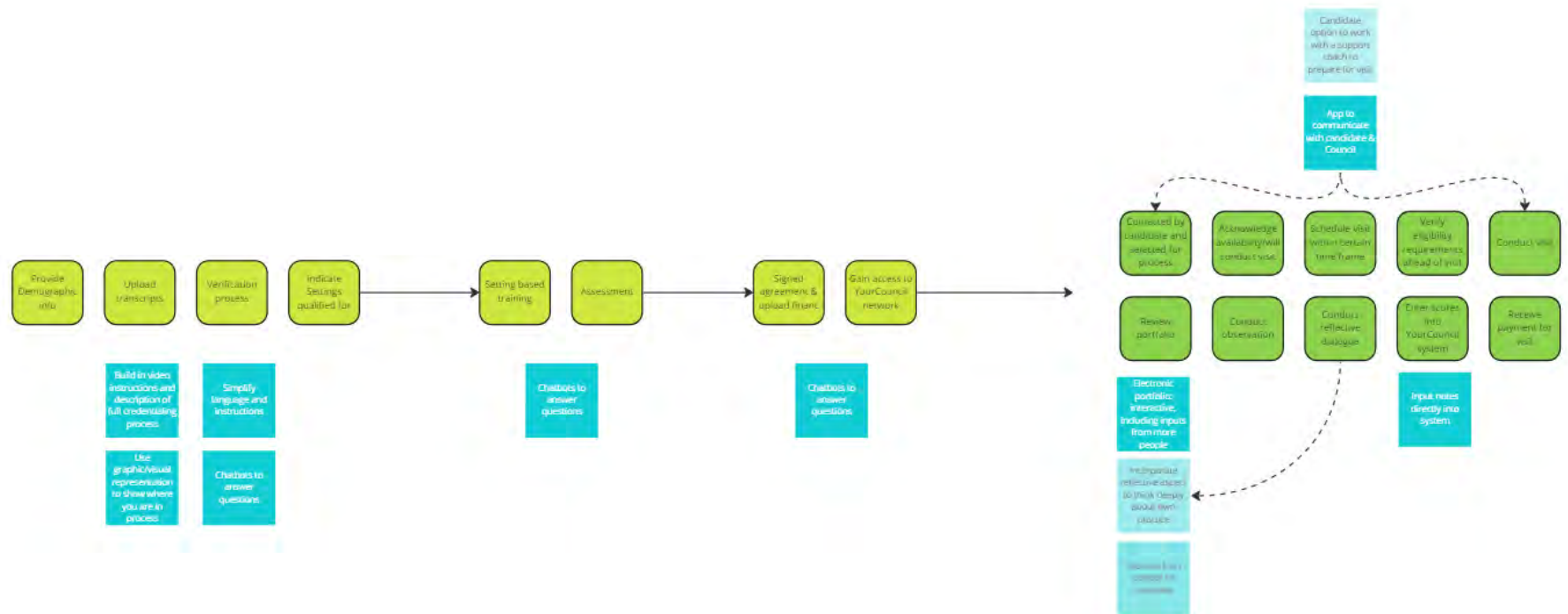
11. Do you think adding chatbots to answer commonly asked questions alongside other digital tools, and/or support coaches, would help alleviate most of the communication issues throughout the process? What would make these tools most helpful?

12. Do you see any major difficulties or obstacles to improvement with these proposed changes? Are there any logistical or individual concerns or issues that you think may have been overlooked?

## Appendix D Candidate Process Map



## Appendix E Professional Development Specialist Process Map



# Council Grant Funded Solutions

1. Through an equity lens, reviewed and proposed updates to the Council's *Essentials for Working with Young Children* and added equity language to the *Competency Standards* texts.
2. Engaged a translation company to enhance our Spanish translation capacity.
3. Enhanced translation capacity by translating documents in Arabic for an Arabic-speaking Focus Group.
4. Hired a Director of Community Engagement and Learning, with a focus on equity.
5. Conducted a reliability study to begin standardizing the Professional Development Specialist (PD Specialist) rubric to guide feedback to candidates, so the Verification Visit process is a consistent and reliable evaluation of the candidate.
6. Explored and prepared a proposal for streamlining the PD Specialist role in terms of training and endorsements.
7. Made virtual Verification Visits a permanent option for all candidates.
8. Explored and prepared a proposal for the role of advisor and support coach in the credentialing process.
9. Explored and prepared a proposal for a direct, toll-free number for PD Specialists to use while conducting Verification Visits.
10. Completed the framework for the electronic portfolio for Infant-Toddler, Preschool, and Family Child Care, finalizing the bi-lingual and home-visitor portfolio framework.
11. Designed a more visually appealing *YourCouncil* Interface and dashboard for candidates and PD Specialists.
12. Included digital credential capabilities in the requirements for the new *YourCouncil* CRM system.
13. Explored remote exam options with Pearson Vue.

# Katorra Enoch-Longshore

Washington, DC 20019 | 202-421-0742 | styledforu@gmail.com

## BUSINESS and ENGAGEMENT OPERATIONS MANAGEMENT

A builder of high-performance teams and a natural leader, mentor, and motivator, who thrives in environments requiring a high-level of strategy, with dedicated focus on details.

Organized and accomplished professional, offering 10 years of outstanding skills leading and managing strategic program, partnership, and event operations. Equipped with strong business acumen, encompassing tactical planning, compliance, process analysis, and project management. Acknowledged for excellent performance in negotiating, managing, and executing and settling business contracts. Adept at identifying and evaluating work performance problems within the establishment to facilitate communication and drive attainment of pre-established organizational goals.

- ◆ Community Engagement
- ◆ Contract Management
- ◆ Employee/Client Engagement
- ◆ Event Management
- ◆ Logistics Management
- ◆ Organizational Skills
- ◆ Project Management
- ◆ Productivity Improvement
- ◆ MS Office
- ◆ JEDIB Advocate

## EDUCATION

Diversity and Inclusion Certificate, ECornell University

May 2022

Credentialing Specialist Certification, Institute for Credentialing Excellence

December 2018

University of Maryland College Park, College Park, MD - B.A., Studio Arts

May 2015

## TRAININGS

Diversity in the Workplace, ADP

It's the Law, The Legal Side of Management Training for Manager, ADP

Ready. Set. CHANGE! Reacting Smarter. Adapting Faster. Engaging Together, CRM Learning

Harassment and Discrimination in the Workplace, ADP

Performance Management Training, ADP

## PROFESSIONAL EXPERIENCE

### **COUNCIL FOR PROFESSIONAL RECOGNITION**

**Promotion, Community Engagement and Learning, Director**

Community Engagement and Learning, Manager

**Washington, DC**

**March 2022-Present**

**January 2020 –March 2022**

*Direct the national and regionally focused, higher education, and ECE initiatives designed to impact the overall workforce competency of early educators working with young children from birth to age five. This work directly involves designing systems that use the National CDA™ to build a competency-based framework that defines common expectations across all early childhood settings; develop accessible pathways and support mechanisms, with a focus on addressing the needs of underserved communities, to ensure all members of the entities early childhood workforce have equitable opportunities; and collaborate with local communities to ensure the curriculum and pathways are implemented in ways that are contextually grounded and culturally responsive.*

- ◆ Lead in development and expansion of CFPR's Community Engagement and Learning departments to include, Higher Education Consortium, Council Alumni Network, and Early Educators Leadership Conference (EELC)



- ◆ Strategize future cultivation, optimal performance, sustainability, and governance of each program while monitoring and evaluating performance
- ◆ Oversee the direction of the Community Engagement and Learning 's objectives and key results for external events, large-scale projects, collaborations, and programs while ensuring high-quality brand experiences
- ◆ Cultivate, motivate, and empower staff of the Community Engagement and Learning team to embody the core values of CFPR using justice, equity diversity, inclusion and belonging approach.
- ◆ Partner closely with brand experience team and other departments/teams to build a consistent brand experience across multiple touchpoints and audiences
- ◆ Generated upward of 20K in fundraising and in-kind sponsorship

#### **COUNCIL FOR PROFESSIONAL RECOGNITION**

**Washington, DC**

#### **Promotion External Engagement Alumni Relations & Higher Education, Manager II September 2018 –January 2020**

*Offer dedicated superior business operations support to the External Engagement Director I, with the Alumni Relations and Higher Education division within the Council for Professional Recognition. Provide dynamic strategic business growth and activities for all the Council with exceptional customer service that focuses on, domestic and international early childhood education workforce initiatives and business development. Serve on three Higher education Advisory Councils' providing subject matter expertise on early childhood learning and represent the Councils at various conferences and/or workshops.*

- ◆ Generate and implement effective business development processes that are designed to research, analyze, measure, and sustain new business relationships. My efforts lead to intelligent decision-making, which ensures quarterly and yearly goals are achieved leading to yearly revenue growth that resulted in a systems approach for procuring new partnerships with higher education institutions as well as other organizations.
- ◆ Advise the Council with establishing strategic goals for building an executable business plan to meet their financial monthly and yearly goals of new major programs, which results in significant contributions to long-term revenue and growth of the Council.
- ◆ Collaborate with and engage with NGOs to seek opportunities to leverage their research capacity, convening opportunities, and to share advancements in the ECE workforce.
- ◆ Document and share best practices & innovation with examples of successful integration of competency-based education credentials into college credit at both the individual institution and statewide levels.
- ◆ Identify and apply quantifiable approaches with data collection processes to effectively identify and build relationships with external stakeholders, identify client's needs, and communicate the data findings and provide applicable recommendations to the Council, the Director, and CEO of Council for Professional Recognition.
- ◆ Develop and maintain the new alumni group, including internal and external engagement.
- ◆ Manage External Engagement Specialist team assisting in the collection and sharing of content for research, white papers, one-pagers, publications, webinars and other opportunities.
- ◆ Oversight of higher education partnerships, ensuring successful recruitment, account management and growth in the number of higher education institutions that offer CDA articulation with credit

#### **COUNCIL FOR PROFESSIONAL RECOGNITION**

**Washington, DC**

#### **Promotion Strategic Alliances, Account Manager**

**January 2017 – September 2018**

- ◆ Governed China and Egypt's education pilot program, signage of all the agency's international business contracts, and provided account management for 27 partnerships.
- ◆ Conducted direct partner activities including prospecting, in-person partner calls, targeted follow-up, contract preparation and review, proposal management, and negotiated and closed contract deals. My effects produced sufficient Statement of Work (SOW) deliverables and corresponding cost-loaded project schedules, developed vision and content for annual conferences, and raised \$25,000 in sponsorship funding.
- ◆ Developed, implemented, and managed project planning processes for the Strategic Alliances team, including workflow plans and project schedules to meet objectives using Hubspot and Salesforce project management software tools.
- ◆ Coordinated and managed the team, ensuring project goals were met prior to or by the projected deadline date.
- ◆ Revised and implemented correspondence management procedures that effectively formalized documentation processes and created a more systematic approach to track return of investment metrics.

- ◆ Served on three education Advisory Councils' providing subject matter expertise on early childhood learning and represented the Councils at various conferences and/or workshops. Maintained professional relationships with leadership, staff, and ECE workforce stakeholders locally and worldwide, by communicating both orally and in writing to provide effective guidance as appropriate and maintain communication across the board.

#### **Council for Professional Recognition**

##### **Professional Development Specialist, Team Lead**

**Washington, DC**

**April 2016 to January 2017**

*Oversaw the professional development specialist system of 7,000 plus specialist nationwide with the Council for Professional Recognition, provided internal support to the Senior Manager and provided guidance to the national stakeholder organizations on the development and execution of case management models to achieve goals.*

- ◆ Prioritized opportunities for client recruitment and engagement, which resulted in improving the service metric by 25% within the first year while in this capacity, reducing remote travel cost.
- ◆ Developed and managed a LinkedIn group to support the PD Specialist's community of practice to foster meaningful and impactful engagement.
- ◆ Coordinated with the Senior Manager on contracts and acquisition functions, which included but not limited to, researched, and analyzed current market conditions and cost factors, related to acquisition planning to produce detailed briefs.
- ◆ Managed all content updates to the procedural manual, quality assurance related protocols and implementation of the Verification Visit process.

#### **STYLED FOR YOU**

##### **Independent Fashion Consultant**

**Washington, DC**

**October 2009 to Present**

- ◆ Provide feedback on current fashion trends, and design concepts to compose abstract ideas.
- ◆ Prepare apparel and accessories for still-life photography, runway production. This includes steaming, ironing, stuffing, pinning, propping, organizing and repackaging product.
- ◆ Developed mood boards and created activities and info graphics to support clients with achieving their style goals.
- ◆ Conducted Virtual and in-person styling sessions outlining style goals, informing purchases based on client style assessments, and procuring and buying items online and in store according to budget.
- ◆ Brainstorm with client to effectively create and implement fashion content that are true to brand identity and generate more consumer awareness.
- ◆ Organized Clothing Swap events and Pop-up stores for retail sales and market segmentation
- ◆ Managed and supervised activities related to company's blog, marketing and commissions.
- ◆ Leveraged social networking techniques for collaboration with others.

#### **National Association for the Education of Young Children**

##### **Program Support Specialist**

**Washington, DC**

**September 2008 – April 2016**

- ◆ Offered efficient recommendations to develop a marketing action plan to increase client participation and revenue throughout the year. Created and monitored community outreach functions via Icohere, which generated over 10,000 views. Maintained high customer satisfaction ratings that exceeded the agency's expectation.
- ◆ Conducted organizational needs assessment with the National Association for the Education of Young Children, collected and compiled data findings, which resulted in delivering expertise direction that ensured the development and implementation of the program support regulations and procedures offered efficient service handling special cases, and client and program needs.

- ◆ Communicated to clients the NAEYC's Standards policies and procedures, and expert information that ensured participating clients achieved their professional development and training goals, as well as the outcome of the agency's curriculum.
- ◆ Drafted professional development policy and procedural manuals, acquisition plans, source selection plans, and model contracts to ensure quality assurance. Attended weekly meetings to discuss workflow productivity and suggested recommendations to improve business processes when applicable.

# Children's Equity Project Report

## INTRODUCTION

The Council, in partnership with the Children's Equity Project, systematically reviewed the National CDA Competency Standards and embedded equity across all the professional requirements. This work included a comprehensive review of the *Essentials for Working with Young Children*, the Council's premier publication, which incorporates the pedagogy every early educator needs in their practice. This is important because in children's earliest learning experiences, teachers and child care providers lay a solid foundation that promotes learning, development, and wellness. However, research shows that Black, Indigenous, and Latino children are often the victims of bias, low expectations, and harsh discipline.

The goal of this project was to embed equity concretely in *Essentials for Working with Young Children*. This important professional effort would develop new equity-specific content in the CDA competencies, which would improve learning conditions for all young children, including children of color, as well as those from historically marginalized communities, and aim to provide a solid foundation for children's early learning experiences. Ensuring that these issues are at the core and beginning of our early childhood educators' professional pathways sends the key message that the field starts with and centers on equity.

## METHODOLOGY

To begin this work, the Council and Children's Equity Project looked at the preparation of curriculum materials and asked themselves, "How can we make equity unavoidable?" In order to do this, they made sure to embed equity and inclusive teaching into every competency area so trainers and candidates could not skip through or gloss over any sections.

The competency areas include:

- Establishing a safe and healthy learning environment
- Supporting physical and intellectual development
- Supporting social and emotional development
- Building relationships with families
- Ensuring a well-run, purposeful program
- Maintaining a commitment to professionalism.

To complete this work, the Council and Children’s Equity Project took a step-by-step approach and organized the work into two phases. The first phase of the project established a protocol to review and edit *Essentials for Working with Young Children*, a significant and time-consuming task. This key CDA textbook is over 500 pages, and each page needed to be read through an equity lens. The goal of this phase was to make sure the publication provided the most inclusive language and up-to-date best practices to ensure more early educators enter the classroom with a better understanding of systems of oppression and systemic racism, how these systems manifest themselves in learning settings, how individual biases interfere with positive relationships and harm children, and, importantly, what they can do about it. This, in turn, will improve the learning experiences of children from historically marginalized communities.

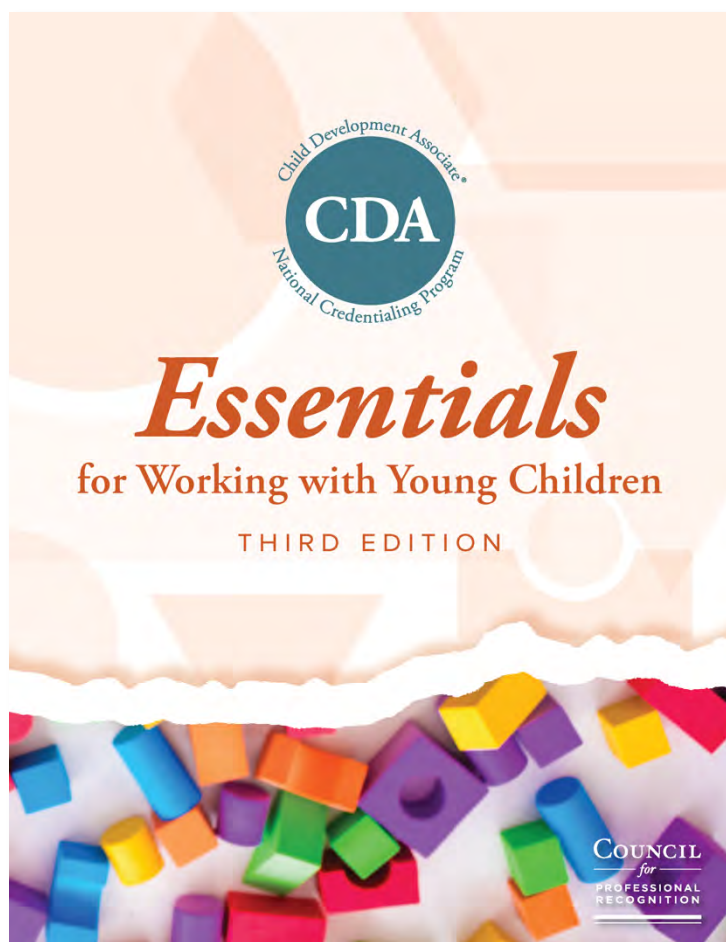
The second phase of the project brought together a technical working group of experts in early childhood equity to develop the new functional areas, including concrete examples of how they could be implemented in the classroom. Five working meetings were conducted to review each of the CDA’s existing competencies and concretely embed equity through the development of new functional areas.

## RESULTS

At the end of the grant period, the two major goals achieved were: concretely embedding equity concepts and improving *Essentials for Working with Young Children* and the CDA curriculum, and bringing together a technical working group of experts to review the National CDA Competency Standards. The technical work group will also develop and recommend new equity focused functional areas for each of the CDA competency goals. *Essentials* was released in March of 2023 and the proposed changes to the Council’s National CDA Competency Standards will be made available to the field through a public comment period later in 2023.

# Essentials for Working with Young Children, Third Edition

Released March 1, 2023



## What's New in This Edition

Dr. Calvin E. Moore, Jr.



*Equity has always been the heartbeat of the Essentials for Working with Young Children. The first edition came out in 1991 as the Council for Professional Recognition worked to provide more skilled, qualified teachers to meet the needs of low-income children. This mission has stirred early childhood teachers and advocates since the birth of the Child Development Associate (CDA) Credential 46 years ago at the behest of Head Start. The challenge was to conceive an inclusive, structured way for colleges and training groups to give teachers the competence and confidence they need to bring our all children's best.*

The Council paved the way ahead in the first edition of the *Essentials*. Our goal in the new textbook was to lay out an approach that would guide teachers in helping young children "master skills, develop friendships, grow in independence, and move to new levels of thinking and understanding about the world," as we explained to readers. The result was a model curriculum to help build a model world based on tolerance and inclusion.

But we didn't just tout these high ideals. We gave our values teeth by showing teachers how to impart them in the early childhood classroom. And we made this clear by presenting the second edition of the *Essentials* as a "practical manual" that conveyed the latest research and advice on helping young learners advance. Still, the step-by-step tools we gave CDA students all added up to promote our longtime social mission.

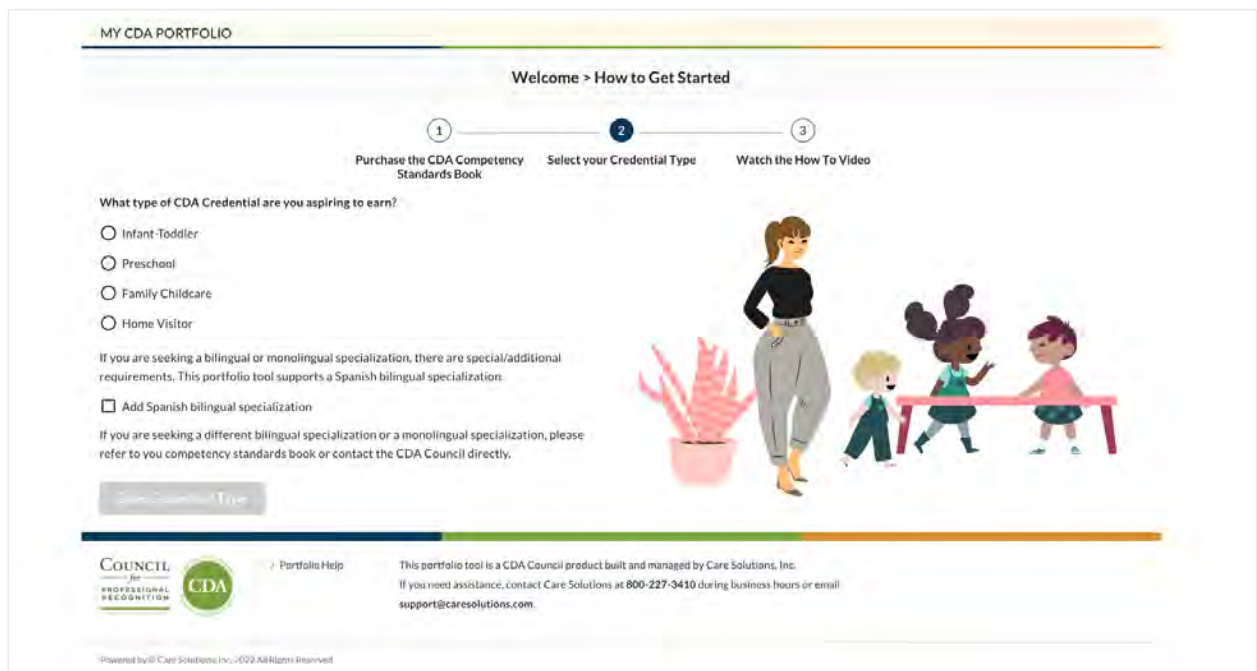
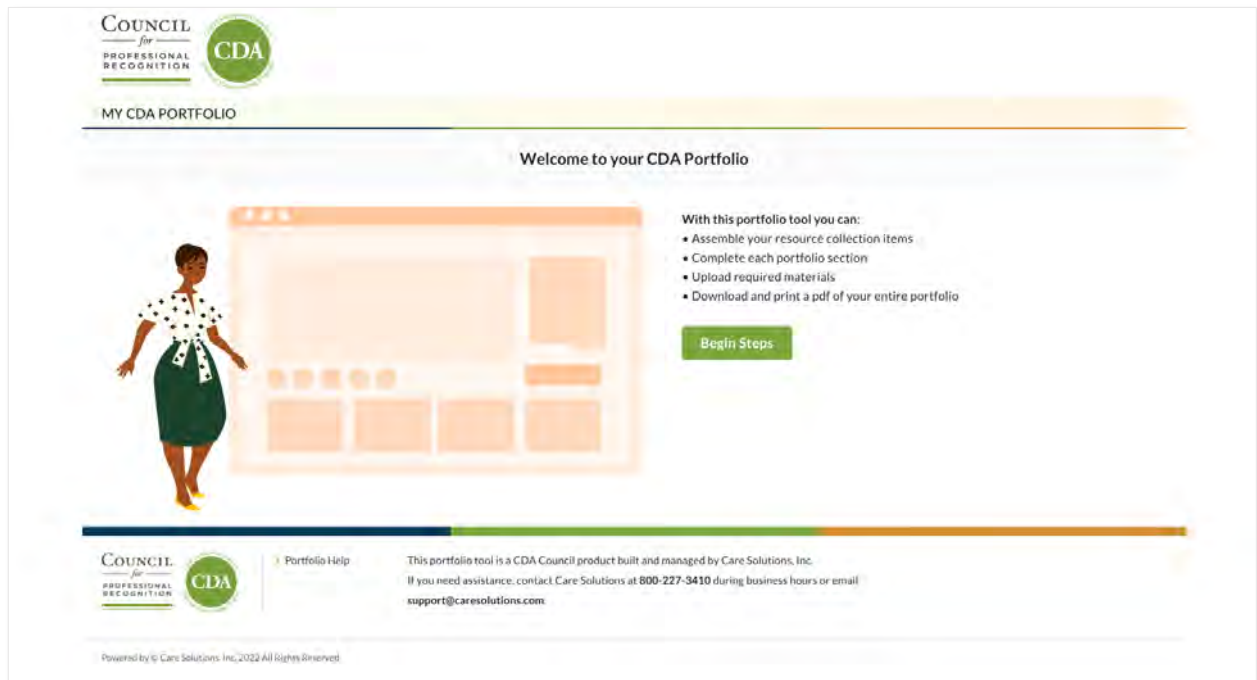
Recent events have led the Council to be even more committed to the advancement of equity in the early childhood classroom. In the past few years, there's been a rise in racial and ethnic tensions, pointing to the need to teach tolerance when young minds are most open. Equally pressing is the shortage of early childhood teachers, a persistent issue that took the spotlight during the pandemic. The gap between supply and demand is especially glaring in low-income communities and those of color—precisely the ones that suffered the greatest losses from the pandemic.

All this fueled public support for a fairer, more balanced system. So, we seized the moment to work with the Children's Equity Project and embed equity throughout our new edition of the *Essentials*, from the type of books we recommend to techniques for settling conflicts and talking to families. We've honed our focus on how teachers can use the microcosm of the classroom to make a macro impact by giving children a sense of social justice when they are still small.

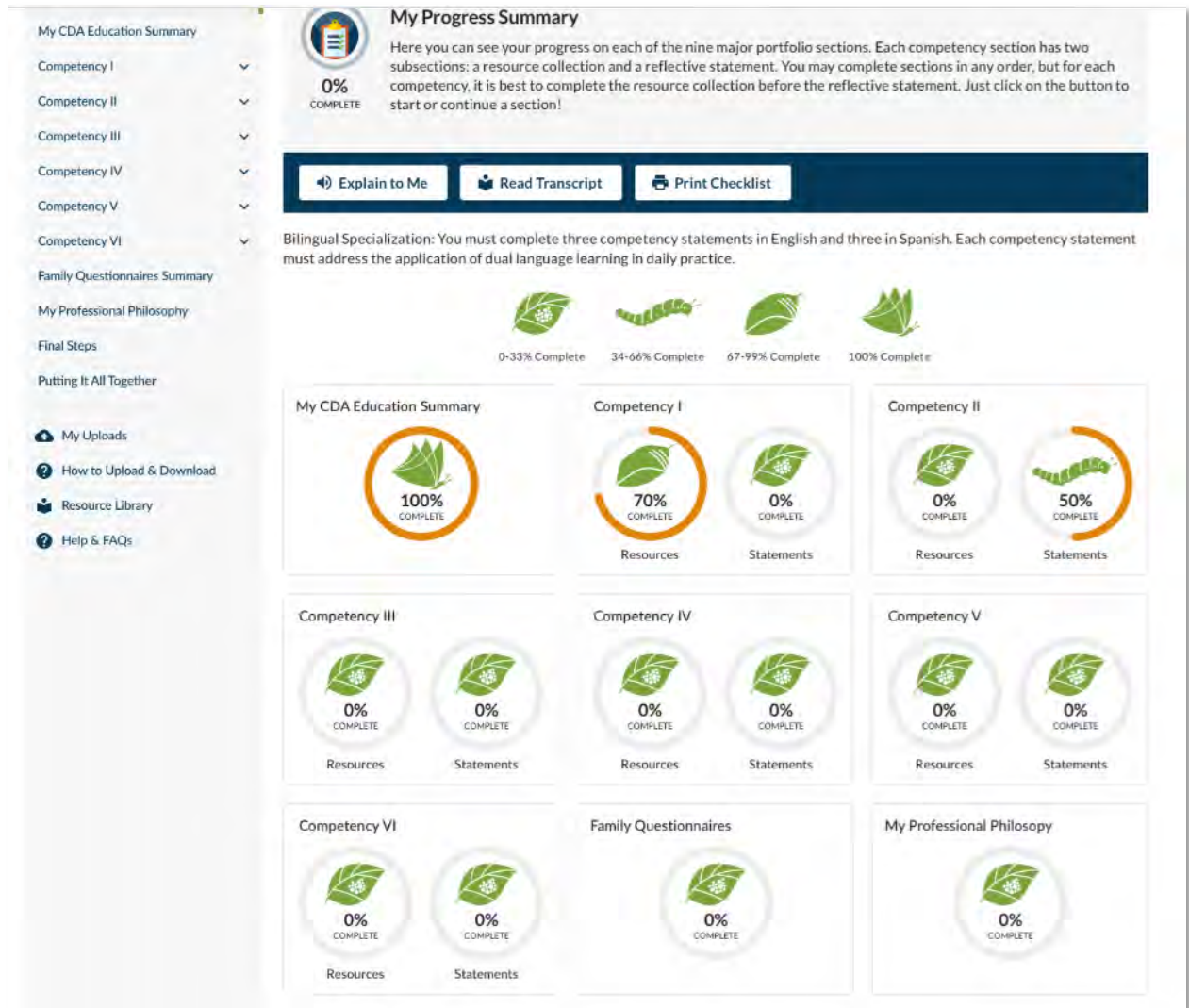
That's also a prime time for children to learn to value differences among their peers in our increasingly diverse classrooms. So, *Essentials* includes a new section on cultural capital. We urge teachers to view young children through a strengths-based lens and recognize the cultural richness they contribute. In today's multicultural classrooms, children also have a wide range of attitudes toward eating, sleeping, playing, and more. So, *Essentials* now offers new tips on how to help young learners rejoice in what joins them and respect what sets them apart.

Our children have changed, so we have broadened our discussion on the best ways to help them succeed. Still, we have stayed true to our roots as we support our early childhood teachers in earning their CDA. A key step in the credentialing process is careful study of *Essentials*, and it, too, has paved the way for change while preserving the past. Now—at 46 years ago—we're determined to give all children the head start that they deserve in school and life. Building equity is still the essence of *Essentials*.

# Mockups: Electronic Professional Portfolio









## MY CDA PORTFOLIO

- My Progress Summary
- My CDA Education Summary
- Competency I
- Competency II
- Competency III
- Resource Collection III
- Competency III Statement
- Competency IV
- Competency V
- Competency VI
- Family Questionnaires Summary
- My Professional Philosophy
- Final Steps
- Putting It All Together

- My Uploads
- How to Upload & Download
- Resource Library
- Help & FAQs



10%  
COMPLETE

### COMPETENCY III: TO SUPPORT SOCIAL AND EMOTIONAL DEVELOPMENT AND TO PROVIDE POSITIVE GUIDANCE

#### My Competency Statement III

Write 1-2 sentences to say how your teaching practices help to support social and emotional development and to provide positive guidance in each of the boxes provided. (Boxes will expand as needed.) For each text box, answer the question under the heading. Click on "See ideas," to see some things you could write about using your own words.

Explain to Me

Read Transcript

Preview

Print

#### Social Development

How do your teaching practices support social development?

[See Ideas](#)

In my teaching practices, I support social development by

#### Emotional Development

How do your teaching practices support emotional development?

[See Ideas](#)

In my teaching practices, I support emotional development by

#### Positive Guidance

How do you provide positive guidance in your teaching practices?

[See Ideas](#)

In my teaching practices, I provide positive guidance by

Save Draft

Save & Submit

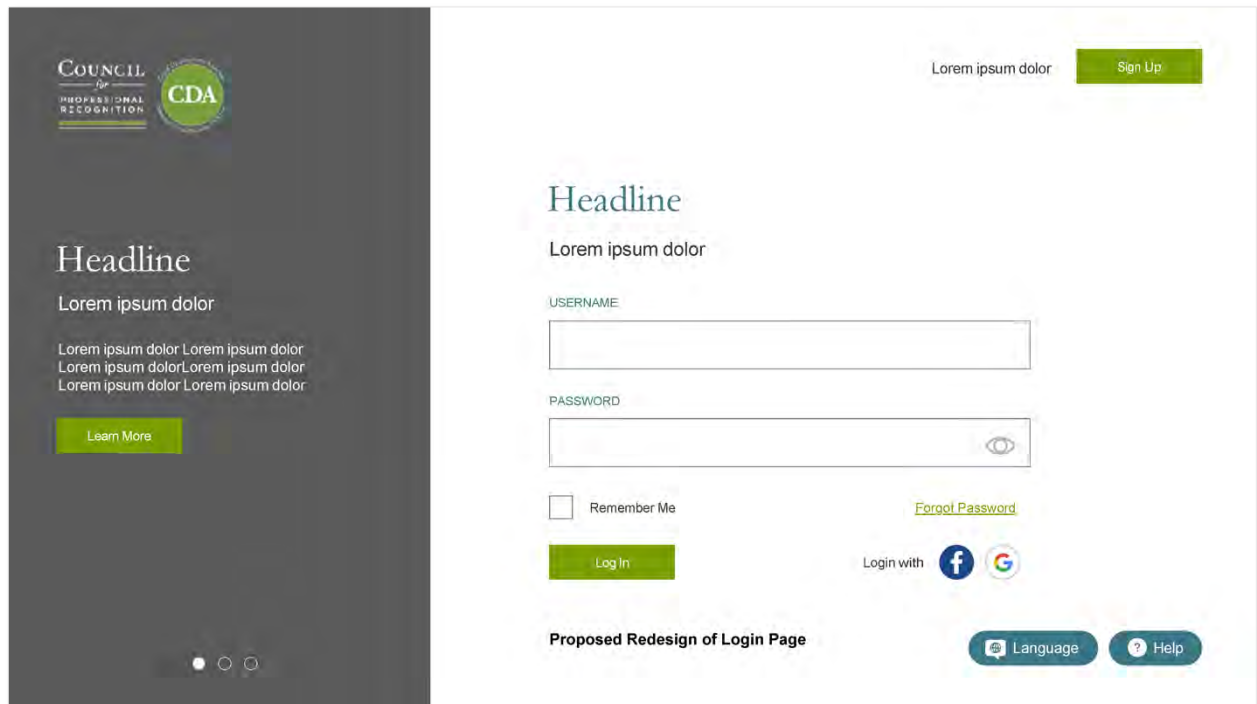
#### CS III-a - Supporting Positive Self-Concept and Social-Emotional Skills

What are some of the ways you support the development positive self-concepts and growing social/emotional skills in children?

[See Ideas](#)

I support the development of positive self-concept and social-emotional skills in children by

# Mockups: New Interface and Dashboard



This mockup shows a proposed redesign of a login page. On the left is a dark sidebar with the Council for Professional Recognition (CPR) logo and a 'Learn More' button. The main content area has a headline, a sub-headline, and a login form. The form includes fields for 'USERNAME' and 'PASSWORD' (with a toggle for visibility), a 'Remember Me' checkbox, and a 'Log In' button. There are also links for 'Forgot Password' and social login options for Facebook and Google. At the bottom right, there are buttons for 'Language' and 'Help'.

COUNCIL for PROFESSIONAL RECOGNITION CDA

Headline  
Lorem ipsum dolor  
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Lorem ipsum dolor  
Lorem ipsum dolor  
Learn More

Headline  
Lorem ipsum dolor

USERNAME  
[Text Field]

PASSWORD  
[Text Field] [Eye Icon]

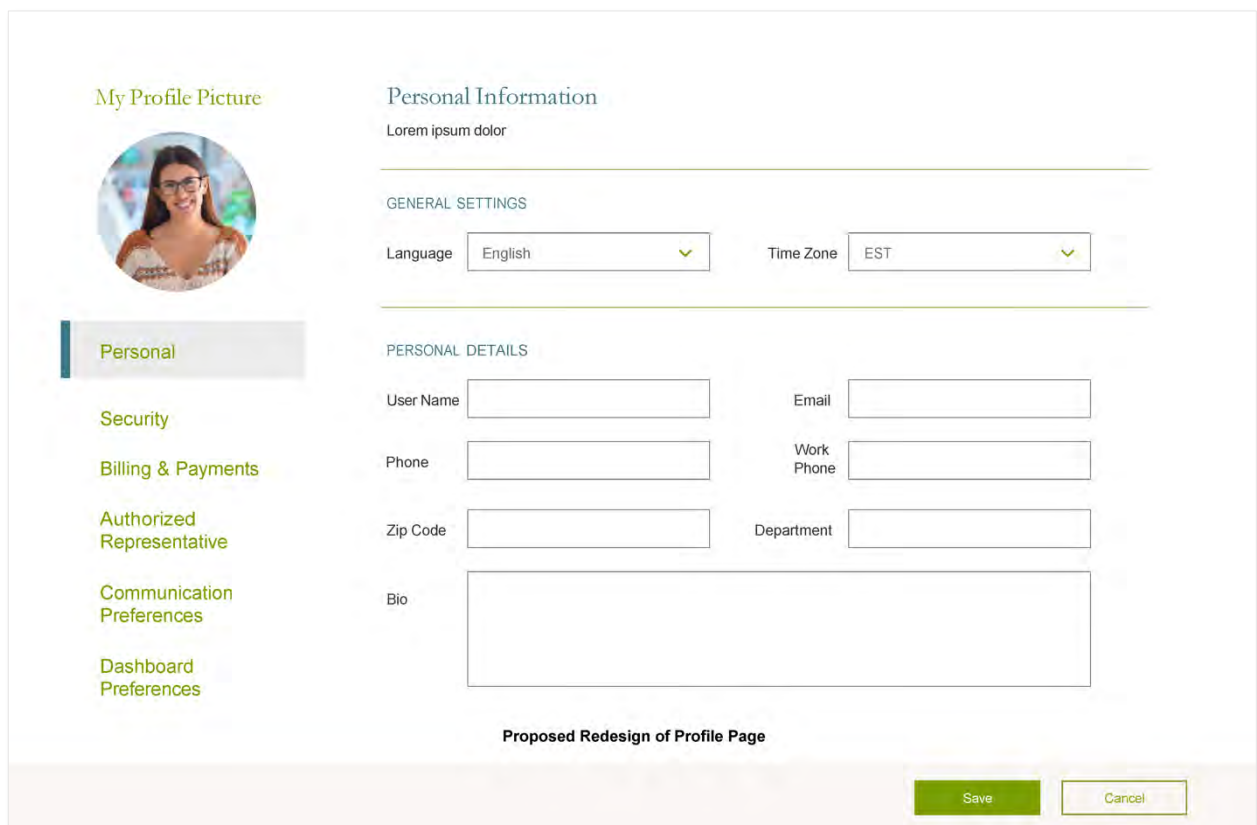
☐ Remember Me [Forgot Password](#)

Log In

Login with

Proposed Redesign of Login Page

Language Help



This mockup shows a proposed redesign of a user profile page. On the left is a sidebar with a profile picture placeholder and a list of menu items: 'Personal' (selected), 'Security', 'Billing & Payments', 'Authorized Representative', 'Communication Preferences', and 'Dashboard Preferences'. The main content area is titled 'Personal Information' and contains two sections: 'GENERAL SETTINGS' with dropdowns for 'Language' (English) and 'Time Zone' (EST), and 'PERSONAL DETAILS' with input fields for 'User Name', 'Email', 'Phone', 'Work Phone', 'Zip Code', 'Department', and a 'Bio' text area. At the bottom right are 'Save' and 'Cancel' buttons.

My Profile Picture

Personal Information  
Lorem ipsum dolor

GENERAL SETTINGS

Language English Time Zone EST

PERSONAL DETAILS

User Name [Text Field] Email [Text Field]

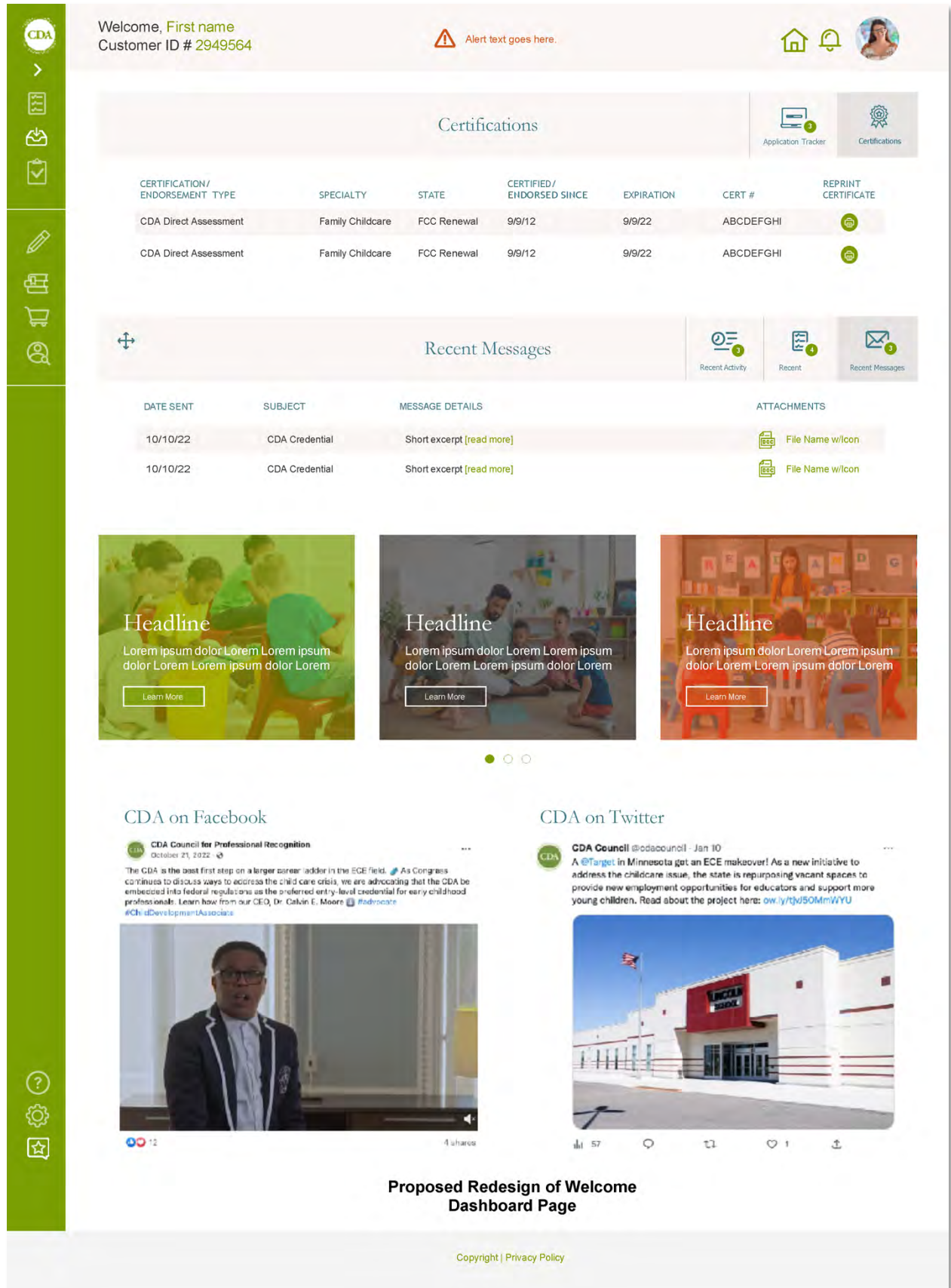
Phone [Text Field] Work Phone [Text Field]

Zip Code [Text Field] Department [Text Field]

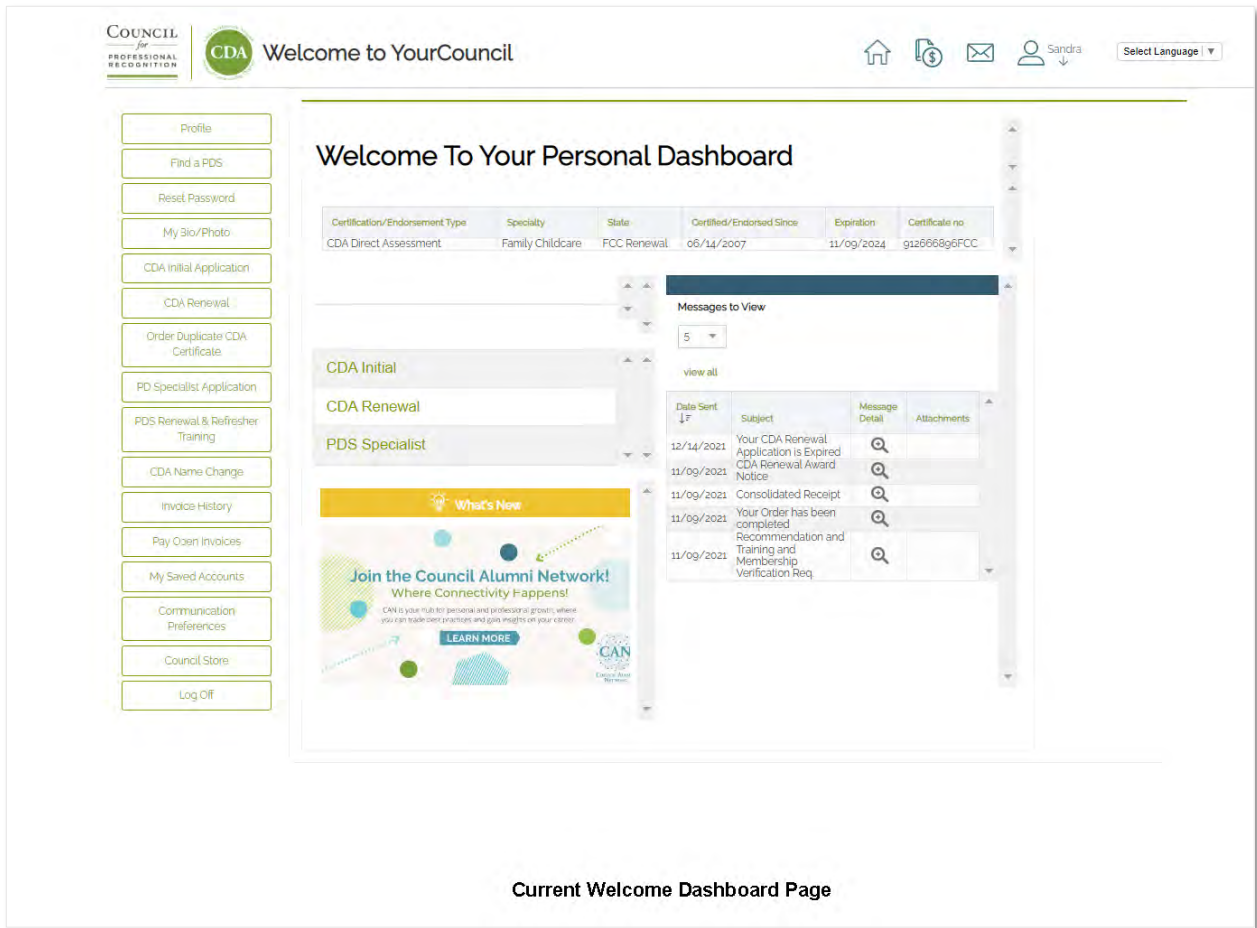
Bio [Text Area]

Proposed Redesign of Profile Page

Save Cancel







Current Welcome Dashboard Page

>

Welcome, **First name**

Customer ID # **2949564**

Alert text goes here.

Application Tracker

Application Tracker

Certifications

Application Name | Application Date | Last Activity

Step Name

Completed on XX/XX/XX

Step Name

Completed on XX/XX/XX

Ready to Schedule (name)

Complete By (Date)

Step Name

Recent Messages

Recent Activity

Recent Tasks

Recent Messages

DATE SENT	SUBJECT	MESSAGE DETAILS	ATTACHMENTS
10/10/22	CDA Credential	Short excerpt <a href="#">[read more]</a>	File Name w/icon
10/10/22	CDA Credential	Short excerpt <a href="#">[read more]</a>	File Name w/icon

Headline

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Learn More

Headline

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Headline

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Learn More

CDA on Facebook

CDA on Twitter

Proposed Application Tracker

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Council for Professional Recognition

W.K. Kellogg Foundation Report | 69





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Welcome, **First name**  
Customer ID # 2949564

Alert text goes here.

### My Applications

Application Name | Application Date | Last Activity

Step Name  
Completed on XXX/XX/XX

Step Name  
Completed on XXX/XX/XX

Ready to Schedule (name)  
Complete By (Date)

Step Name

### Certifications

CERTIFICATION/ ENDORSEMENT TYPE	SPECIALTY	STATE	CERTIFIED/ ENDORSED SINCE	EXPIRATION	CERT #	STATUS	REPRINT CERTIFICATE
CDA Direct Assessment	Family Childcare	FCC Renewal	9/9/12	9/9/22	ABCDEFGHI	Active	
CDA Direct Assessment	Family Childcare	FCC Renewal	9/9/12	9/9/22	ABCDEFGHI	Expired	

### Visits

VISIT TYPE	VISIT DATE	CITY	STATE	SUBMITTAL #	STATUS	CANCEL
CDA Verification Visit	XX/XX/XXXX	Bethesda	MD	506174	Scheduled	
CDA Verification Visit	XX/XX/XXXX	Bethesda	MD	506174	Completed	

#### Headline

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[Learn More](#)

#### Headline

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[Learn More](#)

#### Headline

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[Learn More](#)

### Frequently Asked Questions

QUESTION ABOUT HOW TO DO SOMETHING WITH THE CERTIFICATIONS?

Answer goes here and can go on and on.

QUESTION ABOUT HOW TO DO SOMETHING WITH THE CERTIFICATIONS?

QUESTION ABOUT HOW TO DO SOMETHING WITH THE CERTIFICATIONS?

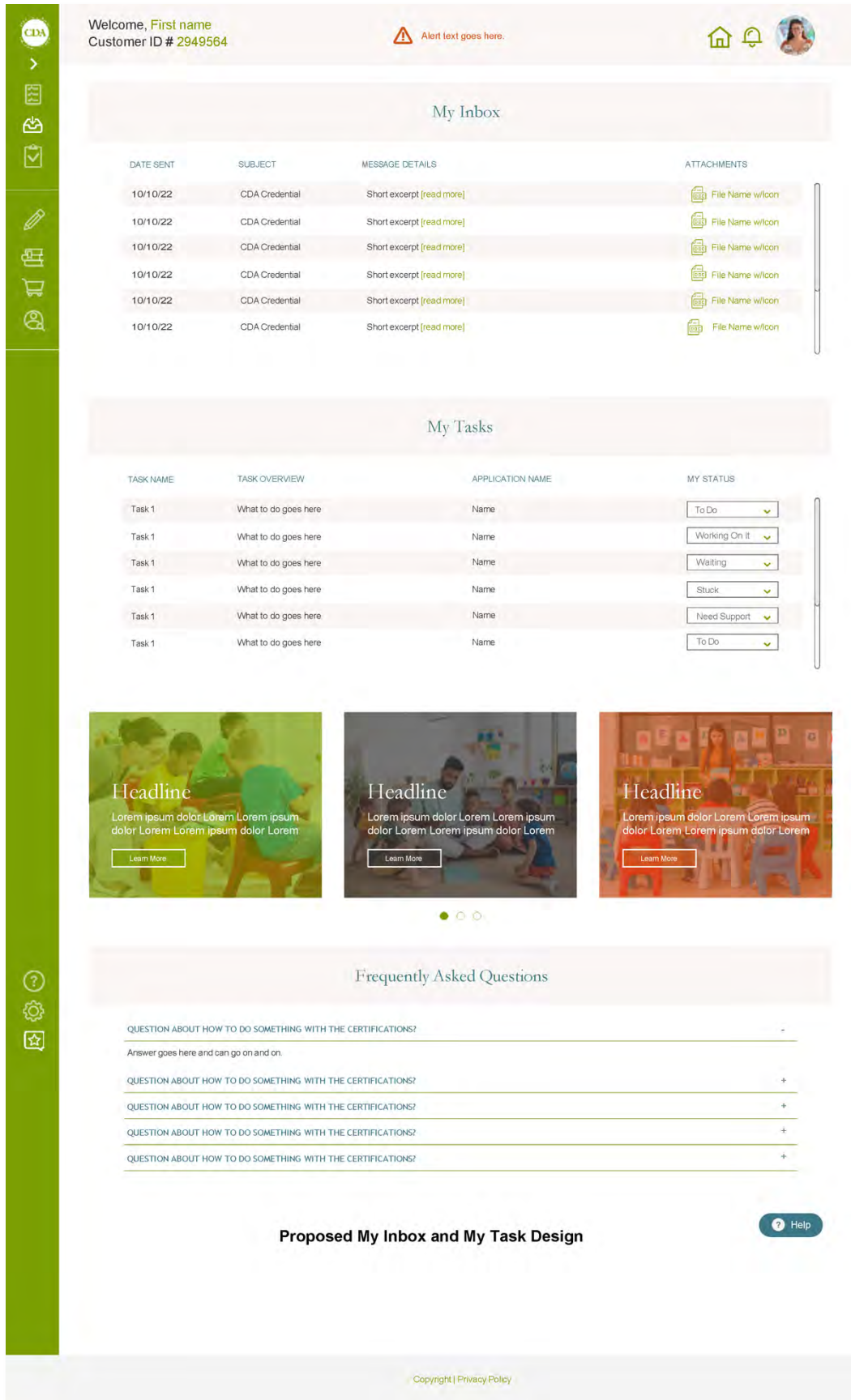
QUESTION ABOUT HOW TO DO SOMETHING WITH THE CERTIFICATIONS?

QUESTION ABOUT HOW TO DO SOMETHING WITH THE CERTIFICATIONS?

Proposed PDS Dashboard Tracker

Help

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# Blue Ribbon Panel on the Provisional CDA

## EXECUTIVE SUMMARY

The Council for Professional Recognition (Council) recently convened a Blue Ribbon Panel to review the feasibility of issuing a temporary provisional CDA credential and a virtual verification visit option as part of the National Child Development Associate Credentialing Program. The Council leadership felt this panel's expertise and experience was needed to assist staff in considering accommodations needed to help overcome the challenges currently being faced by CDA candidates due to restrictions related to the Covid-19 global pandemic. The Blue Ribbon Panel was facilitated by Dr. Calvin E. Moore, Jr., Interim CEO for the Council and consisted of seventeen early childhood education (ECE) professionals with a broad knowledge base in child development, the child care workforce, and ECE subject matter expertise. The meeting also included Council board members and staff.

### Panel Membership

**Linda Hassan Anderson**

Council for Professional Recognition  
Board President

**Dr. Lynette Fraga**

Child Care Aware of America  
CEO

**Dr. Sue Bredekamp**

Author, Senior Consultant

**Dr. Ed. Greene**

Author, Senior Consultant

**Dr. Carol Brunson Day**

Council for Professional Recognition  
Fellow and Former Council CEO

**Eduardo Gamero**

Centronia  
Child Development Associate Coordinator

**Allison Comport**

State of Massachusetts  
Senior Education Specialist

**Mary Harrill**

National Association for the Education of  
Young Children  
Senior Director

**Kirsten Johnson**

National PTA  
Director, Education and Leadership  
Development

**Dr. Gail Joseph**

Bezos Family Foundation  
Distinguished Professor in Early Learning at  
the University of Washington

**Rachel Robertson**

Bright Horizons  
Vice President of Education and  
Development

**Michael Rowe**

DC Office of State Superintendent  
Quality Initiatives Manager

**Shannon Rudisill**

Early Childhood Funders Collaborative  
Executive Director

**Yvette Sanchez Fuentes**

State of Delaware  
Associate Secretary for Early Childhood  
Support

**Letta Simon**

Teachstone  
Chief Strategy Officer

**Albert Wat**

Council for Professional Recognition  
Board Member

**Dr. Elanna Yalow**

KinderCare Learning Centers  
Chief Academic Officer

The mission of the Council is to promote improved performance and recognition of professionals in the early childhood education of children ages birth to 5 years old. In keeping with its goal to meet the growing need 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 Head Start, pre-k, infant-toddler, family child care, and home visitor programs. The Council sets policies and procedures for assessment and credentialing, publishes the Competency Standards and other materials used for CDA credentialing, and administers the assessment.

## Statement of the Problem

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During the ongoing Covid-19 pandemic, the ability of CDA candidates to complete the credentialing process has been hindered with many states instituting regulations that restrict in-person visits to child care facilities. This has created a huge backlog of CDA candidates unable to complete verification visits across the country and internationally for the following logistical reasons.

In order to earn and maintain the CDA, candidates must follow the following sequence of steps: Prepare, Apply, Demonstrate, Earn, and Renew. In the Demonstrate step, that includes the in-person verification visit, the Professional Development (PD) Specialist *reviews* the contents of the Professional Portfolio, *observes* the candidate working with young children, and *reflects* with the candidate by conducting a reflective dialogue session for the purpose of setting professional goals. None of these steps can take place where in-person visits to centers/family child care homes are restricted.

As a temporary accommodation, the Council would eliminate the need for the candidate to complete this part of the credentialing process during the pandemic and instead be issued a “provisional credential.” Or another option to consider is whether the in-person verification visit can be accomplished in a virtual setting.

### **The goals for the Blue Ribbon Panel meeting were:**

1. To examine the feasibility of issuing a provisional CDA as an accommodation during the pandemic
2. To review and refine the criteria/requirements of a provisional CDA as outlined by the Council
3. To develop a list of recommendations for implementing the proposed provisional CDA

## **Meeting Activities**

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The Blue Ribbon Panel met virtually on November 20, 2020 at 10:30 am. Dr. Moore and the Council staff presented background information on the urgent need to accommodate CDA candidates wanting to complete the CDA credentialing process. There are approximately 4,100 CDA candidates waiting for the in-person verification visit. Several states have also inquired about possible accommodations for CDA candidates they are funding to complete the process. After the background presentation, the panelists were divided into two discussion groups. These groups were asked the following questions:

### **Feasibility and Acceptance of a Provisional CDA**

1. After hearing the initial description of the “provisional CDA” please share your initial thoughts?
2. Do you think the early care and education sector will accept a provision CDA? State Systems/Leaders? Industry Leaders? Federal Programs? CDA candidates?

3. What are the challenges around the acceptance of the provisional CDA option?
4. Should the provisional CDA be a permanent option for CDA candidates or just an accommodation during the Covid-19 pandemic as we have proposed?

### Criteria/Requirements of the Provisional CDA

1. What are your thoughts about the criteria/requirements of the provisional CDA as described today? Are there additional criteria we should consider?
2. What would you suggest for the term of the “provisional” CDA?
3. Should the “provisional” CDA be renewable?
4. We have also been thinking about implementing a virtual verification visit option for candidates. Thoughts? Any additional recommendations?

Each group had a notetaker and recommendations were presented to the full group.

## Recommendations

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Below is a list of 8 specific recommendations from the Blue Ribbon Panel:

### **1. The Council should consider not pursuing the provisional CDA credential at this time.**

The burden of what it would take to get buy-in of local, state, and federal systems is too heavy. A provisional credential may affect the Council's success regarding the credential's credibility and validity. It may result in confusing candidates/public to provide 3 types of CDA systems and even frustrating. The amount of work for staff, level of effort and coordination would be immense (for a short term remedy).

### **2. The Council should pursue the virtual verification visit pathway at this time.**

The virtual verification visit is a long-term solution. The Provisional CDA is temporary. If the Council is going to invest, it is better to invest in a contribution of the future (sustainability) longer life and broader impact. Additional Comments: It is more feasible and attainable. People are already comfortable with technology. It is highly recommended to survey and hear the voice of the practitioners and engage in conversations with military systems and Family Child Care, among others. CONCERN: There are equity issues in digital accessibility exacerbated by this pandemic.

**3. The Council must define what is meant by “provisional” if it pursues the provisional CDA.**

A clear definition of what the Council means by “provisional” is important and needed, as well as clear messaging. Is this something that’s temporary and only going to occur during uncertain times/national disasters, or something that is becoming a part of the permanent process? Will there be a virtual component built into the provisional experience by way of the PDS observation? Will it need to involve additional center staff like site/center directors? Clarity on the 12-month timeframe, and any extensions. Ensure that whatever is put in place is humane and equitable to ECE educators. Is there any chance that the provisional can be viewed as “cheapening” or “lessening” the quality of the CDA credential and is it worth the risk?

**4. The Council should take the time necessary to consider the implications of a provisional CDA.**

The feasibility of a provisional CDA may take more time because implications of such a credential on special populations must be considered.

**5. The Council should develop a survey of a broad sector of the ECE field to specifically gather their perspectives on issuing a provisional CDA.**

A survey of the field might be the best way to hear the wants and desires of the ECE field, specifically those most impacted by these changes.

**6. If the Council moves forward with a provisional CDA, create a plan that aligns with all states—not a state-by-state solution.**

There is such variability among the states it will be hard to design a systematic approach that meets everyone’s needs.

**7. Remember that equity matters.**

Remember the implications of such a change on tribes, migrant programs, rural programs, FCC, mon-lingual/bi-lingual, candidates with special needs and exceptionalities, and candidates that can only submit paper applications due to internet accessibility.

**8. The Council should consider the infrastructure needed to implement a provisional CDA.**

Will the implementation of a provisional CDA cause a backlog and will candidates lose their credential in the process of waiting?





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