



CDA Professional Development (PD) Specialist™

PROCEDURES MANUAL

Fourth Edition 2023

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

CDA Professional Development (PD) Specialist™ Procedures Manual – Fourth Edition

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Table of Contents

How to Use the CDA Professional Development Specialists™ Procedures Manual.....	2
Introduction	4
About the Council for Professional Recognition	4
The CDA Professional Development (PD) Specialist™ System	6
The Role of the CDA PD Specialist™	7
CDA Verification Visit® PD Specialists Expectations	8
CDA PD Specialist™ Standards of Practice	8
CDA PD Specialist™ Ethical Principles.....	8
Principle I: Ethical Conduct Amongst Candidates.....	9
Principle II: Ethical Conduct for Practices and Performance.....	9
Principle III: Ethical Conduct Towards Professional Colleagues	9
Principle IV: Ethical Conduct Towards Program and Community.....	10
Determining Conflicts of Interests.....	10
Additional Ethical Considerations	12

Before the CDA Verification Visit® 14

- CDA PD Specialist™ Endorsement Number14**
- CDA PD Specialist™ (PDS) Profile.....15**
- Candidate Contact16**
 - Availability..... 16
 - CDA® Candidate Selection of a CDA PD Specialist™ 16
 - Declining a CDA Verification Visit® 17

Ready to Schedule..... 18

- Scheduling the CDA Verification Visit®19**
 - Pre-Verification Visit Checklist..... 19
 - Request Directions to the Site 22
 - Contact the Program Director..... 22
 - Council Support with Scheduling Assessments..... 22

CDA Verification Visit® 24

- CDA Verification Visit® Preparation..... 24
- CDA Verification Visit® Location..... 25
- Necessary Forms and Documents 25
- Arriving at the Site 25
- CDA® Credential Settings 26
- Special Education Program 28
- Portfolio Review Process..... 28
- Requirements for the Review 30
- Organization of the Professional Portfolio 30
- Documentation of Education Requirements 30
- Family Questionnaires..... 31
- Resource Collection 31
- The Reflective Statements of Competence 32
- Reviewing the Candidate’s Reflective Statements of Competence..... 32
- Recording Problems with Reflective Statements of Competence 33

Professional Philosophy Statement.....	33
Conducting the Observation.....	34
Recording Evidence	34
Reflective Dialogue.....	35
Reflective Dialogue Process.....	35

Special Circumstances..... 38

Special Circumstances	38
Administering the CDA® Paper Exam to Candidates.....	38
CDA® Exam Special Accommodations	40
Pre-Approved Remote Travel Procedures.....	42

After the CDA Verification Visit® 50

Submitting Candidate Scores	50
-----------------------------------	----

Honorarium 52

Payments and Expenses.....	52
----------------------------	----

CDA PD Specialist™ Agreement 52

The Home Visitor CDA Professional Development (PD) Specialist™ 54

Home Visitor CDA Professional Development (PD) Specialist™ CDA Verification Visit® Process	55
---	----

Home Visitor Credential Overview 60

Before the CDA Verification Visit®	60
--	----

Ready to Schedule	60
-------------------------	----

CDA Verification Visit®	62
-------------------------------	----

Entering Candidate Scores.....	65
--------------------------------	----

CDA PD Specialist™ Performance Evaluation 66

Quality Assurance..... 66
Inquiry and Investigation..... 68
Retaliation..... 68
Harassment 69
Contract Termination 69
Conflict Resolution for PDS Manual 70
Security Protocol 70
Conclusion 71

Helpful Documents..... 72

CDA PD Specialists™ Standards of Practice 74
CDA® Candidate Competency Standards At-A-Glance 75
Commonly Used Terms and Definitions 76
Summary of the CDA® Assessment System..... 80
CDA® Credential Settings 83
My CDA® Professional Portfolio 85
Training Documentation Guidelines 86
Summary of My CDA® Education 87
Family Questionnaires Summary Sheet..... 88
Requirements for Candidates’ Reflective Statements of Competence..... 89
Checklist for the Observation 90
Agenda for the Reflective Dialogue with a CDA® Candidate 91
Facilitating a CDA Verification Visit® for Monolingual and
Bilingual Candidates..... 93
Comprehensive Scoring Instrument..... 95
CDA Verification Visit® Reflective Dialogue Worksheet..... 117

For Home Visitor CDA PD Specialists™	119
• My CDA® Professional Portfolio	119
• Summary of My CDA® Education	120
• Agenda for the Reflective Dialogue with a Home Visitor CDA® Candidate.....	121
• Parent Observation Permission Form	123
• Home Visitor CDA® Assessor Recommendation Form	124
• Comprehensive Scoring Instrument	125
• CDA Verification Visit® Reflective Dialogue Worksheet	149

Quality Assurance Guidelines.....	151
CDA Professional Development Specialist™ Independent Contractor Consulting Agreement	152
CDA Professional Development Specialist™ Volunteer Agreement	157
Important Information	161



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

This manual gives a detailed explanation of the procedures, guidelines and regulations governing how to properly conduct the CDA Verification Visit® and operate as a CDA PD Specialist™. It is to be used in conjunction with the Council for Professional Recognition's Child Development Associate® credentialing program and *CDA® Competency Standards book*. CDA PD Specialists should be familiar with the eligibility requirements and data collection responsibilities of CDA candidates. They must follow all the prescribed procedures while conducting CDA Verification Visits on behalf of the Council for Professional Recognition (Council) and adhere to the guidelines that define the CDA PD Specialist's relationship with the Council.

As they carry out their duties, CDA PD Specialists should keep abreast of all the Council's current policies and procedures, as well as new developments in their profession. The Council provides this information in a wide range of mediums, such as CDA PD Specialist™ training, PDS Resource Library, PDS newsletters, social media platforms, blog posts, podcasts, the Council website, Council webinars, group chats and workshops.

The Council will notify CDA PD Specialists™ of procedural changes by providing regular updates to this manual. They may choose to print out the manual and updates and keep them in a loose-leaf binder. Or they may opt to turn to the electronic version that is available in the PDS Resource Library. Either way, it is the CDA PD Specialist's™ responsibility to maintain an updated copy.

The information contained here is designed to assist CDA PD Specialists™ in fulfilling their legal obligations to the Council. ***There can be no deviation from requirements contained in this manual and the contractual agreement that you have signed.***

If you have any questions about these procedures, you should email the Council (pds@cdacouncil.org) or call Customer Service at 800-424-4310 for guidance.



Introduction

About the Council for Professional Recognition

MISSION OF THE COUNCIL

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

VISION OF THE COUNCIL

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

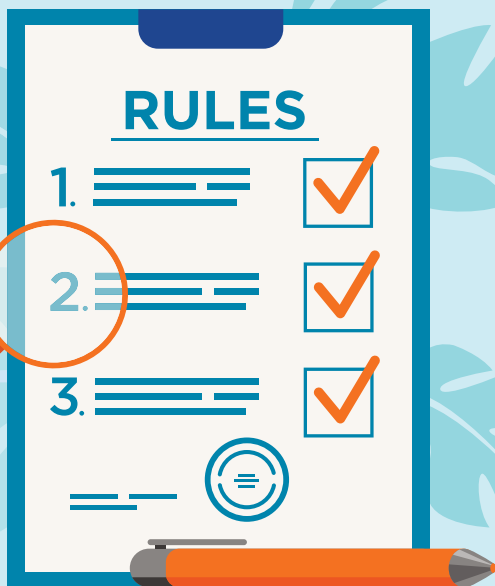
CHILD DEVELOPMENT ASSOCIATE® (CDA) NATIONAL CREDENTIALING PROGRAM

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

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

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





The CDA Professional Development (PD) Specialist™ System

The integrity of the Child Development Associate® (CDA) assessment process in large part rests on individuals like you that are trained and endorsed as CDA Professional Development (PD) Specialists™. A CDA PD Specialist™ provides critical quality control by ensuring consistency in every CDA® assessment. You play an essential role in maintaining the reliability, validity and credibility of the CDA assessment.

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

Validity is a principle well-grounded upon evidence. The PD Specialist system is the Council's dedicated program focused on developing, supporting, and maintaining a network of qualified early childhood professionals serving the CDA candidates. The evidence

you collect for the CDA assessment is designed to distinguish competent candidates from those who meet the competency criteria set out in the *CDA® Competency Standards* books.

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

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

The Role of the CDA PD Specialist™

The CDA® assessment is comprised of two components: the CDA exam and the CDA Verification Visit®. Your role as a PD Specialist is critical to the process as you facilitate the verification visit. You uphold the integrity of the credential by conducting verification visits that are fair, consistent, ethical and professional.

As a PD Specialist you will review and verify the procedures and documents required to complete the verification visit. You are charged to use this manual conscientiously as a resource to perform your responsibilities as a PD Specialist and adhere to the procedures. It is critical that you always conduct CDA Verification Visits in a professional manner that preserves and reinforces the integrity of the CDA assessment.

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

You have the knowledge and the know-how to support the professional development of early childhood education professionals. Furthermore, by being a PD Specialist gives you recognition as an excellent resource and a facilitator of the credentialing process.

CDA PD Specialist™ Expectations During the CDA Verification Visit®

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

CDA PD Specialist™ Standards of Practice

The *CDA PD Specialist™ Standards of Practice* describe the level of understanding, professional practice and service required to conduct the CDA Verification Visit®.

CDA PD Specialist™ Ethical Principles

CDA® candidates are credentialed by the Council, thereby the early childhood education community holds CDA PD Specialists™ in high esteem. The Council expects you, as a PD Specialist, to perform with a conscientious effort exemplifying the highest ethical standards. It is expected that PD Specialists remain objective and practice introspective mindfulness that mitigates biases and prejudices.

PRINCIPLE I: ETHICAL CONDUCT AMONGST CANDIDATES

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

- Treat each candidate considerately and justly when clarifying issues according to the Council's *CDA PD Specialist™ Procedures Manual*.
- Avoid intentionally exposing a candidate to disparagement.
- Manifest a positive mentoring role in the candidate's assessment.
- Maintain confidential information concerning candidates.
- Submit facts without distortion, bias, or personal prejudice.
- Respect a candidate's freedom of choice.
- You may not financially or contractually benefit from the credentialing outcome (excluding the PD Specialist honorarium).

PRINCIPLE II: ETHICAL CONDUCT FOR PRACTICES AND PERFORMANCE

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

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

PRINCIPLE III: ETHICAL CONDUCT TOWARDS PROFESSIONAL COLLEAGUES

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

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

PRINCIPLE IV: ETHICAL CONDUCT TOWARDS PROGRAM AND COMMUNITY

As a PD Specialist and early childhood education professional, you will:

- Make concerted efforts to communicate to the candidate all information needed to support the candidate's completion of the assessment process.
- Contact the candidate's program director or supervisor to inform them about the upcoming candidate's verification visit. You should also show appreciation towards the director for supporting the candidate and answering any general questions related to the verification visit.
- Strive to understand and respect the values, traditions, and religious beliefs of the diverse cultures represented in the program and in the candidate's classroom.
- Comply with local, state and federal laws, in addition to Council policies.

Determining Conflicts of Interests

A conflict of interest is situation that has the potential to create a risk that professional judgment, assessment, or actions regarding a primary interest will be unduly influenced by a secondary interest.

During the CDA Verification Visit®, you must remain objective, unbiased, and unprejudiced in the assessment of the CDA® candidate's efforts to obtain the CDA Credential. The Council relies primarily on the CDA PD Specialist's™ judgment and capability to bring an independent perspective to the visit.

The conflict-of-interest policy protects the integrity of the CDA credential and supports the candidate in receiving a fair assessment during the verification visit. Serving as a PD Specialist comes with many responsibilities (as outlined in this manual). The relationship between the CDA candidate and the PD Specialist is an important one as mentoring/coaching is a component of the assessment. At the same time, some of these relationships can create a significant risk in the subjective assessment of the CDA candidate during the verification visit. In these instances, a conflict of interest may arise.

It is your duty to discuss with the candidate any possible ethical conflicts of interests and decide accordingly. Outlined below are specific relationships that disqualify you from serving as a PD Specialist for a candidate:

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

1. You are the candidate's:
 - Relative (related by blood, marriage or other legal relationships)
 - Direct supervisor, teacher/trainer, director, center employee (including for example, a co-worker in the same group, classroom or center site) in the past three years.
2. The candidate is the employer.
3. You have a child in the candidate's class or group.
4. You have served as the candidate's CDA PD Specialist™:
 - For another CDA® credential.
 - In the past and the candidate is reapplying for the same credential.
5. You have a financial and/or contractual interest related to the candidate or may benefit in any way from the candidate's credentialing decision.
6. Any person who may have a personal or professional bias toward or against the candidate, or any group of which the candidate is a part (such as peer, friend or foe).
7. A licensing agent who has conducted a review, inspection or other service within the past two years for the child care facility.

If a PD Specialist is involved in any of these types of relationships with the candidate, the PD Specialist may **NOT, under any circumstances, accept the assignment. The PD Specialist is required to communicate with the CDA candidate the conflict of interest and direct the candidate to select a new PD Specialist. In the event a conflict of interest is discovered by the Council, and the credential has been awarded, the credential may be rescinded.**

ADDITIONAL ETHICAL CONSIDERATIONS

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

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

- In a personal relationship/friendship with program directors, owners or trainers (for example, but not limited to, limiting candidates to the use of one PD Specialist).

The Council reserves the right to take action and reject/return the candidate's application at any time should a question of conflict of interest arise. As standard practice, all PD Specialists and candidates are required to sign a *Statement of Ethics*.

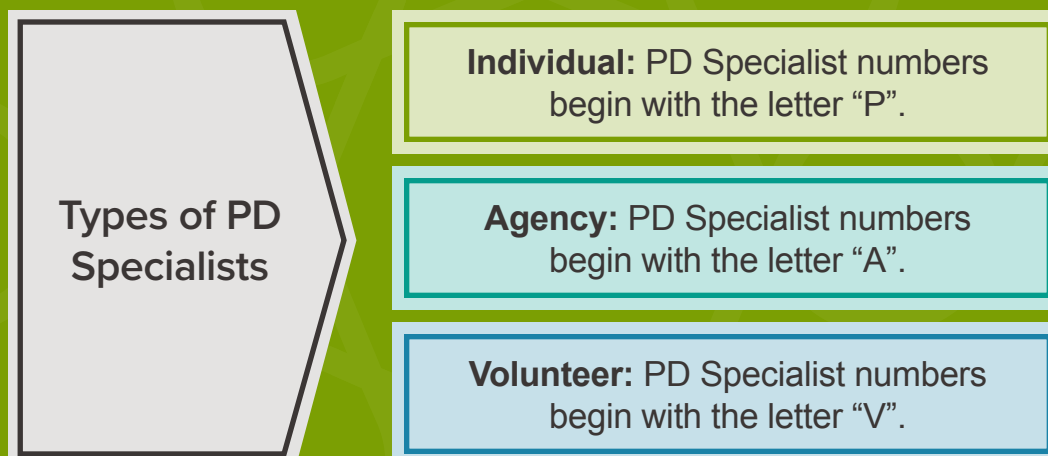


Before the CDA Verification Visit[®]

For you to begin your role as a CDA PD Specialist[™], you must have a few items ready for the CDA[®] candidate, namely your CDA PD Specialist endorsement number and online profile (biography) in *YourCouncil*.

CDA PD Specialist[™] Endorsement Number

After you have completed your training as a CDA PD Specialist[™], you are assigned a unique certification number beginning with a capital letter (P, V, A) followed by eight numerals (i.e., P12345678). You must provide your complete endorsement number to each candidate since it is a requirement to complete the CDA application.



CDA PD Specialist™ (PDS) Profile

You will be required to maintain and update your CDA PD Specialist™ profile in *YourCouncil*. The profile includes your contact information, professional skills, expertise, spoken languages and setting specialization. Your profile in *YourCouncil* links directly to the profile card within the online *Find-a-PD Specialist Online Directory*. You may access *YourCouncil* any time to update your profile and biography. You may also upload a headshot photo of yourself (like a passport photo) to the profile. This section in *YourCouncil* is accessible by the “My Picture (Upload a picture) tab.”

There is a section on the PDS profile for you to complete a short professional statement about yourself. This statement will appear on the profile card within the *Find-a-PD Specialist Online Directory*. Since there is limited space to write your professional statement, it is important to highlight just those critical facts that candidates should know when selecting a PD Specialist. Consider including in your statement such things as a current background check, specialized knowledge and talents. These kinds of factors will help candidates determine the best choice of PD Specialist in their local community.

Each PD Specialist may edit the content of their profile and biography at anytime.



Candidate Contact

Your role as a CDA PD Specialist™ begins when the candidate makes the initial contact with you, and you agree to serve as their PD Specialist. During this time, you will have specific responsibilities, as detailed below.

1.1 AVAILABILITY

You must keep the Council informed about your availability to conduct CDA Verification Visits™ and maintain your contact information in the *YourCouncil* online profile. There are no guarantees that a candidate will select your services, but you are encouraged to market yourself within your local community in places such as community colleges, universities and Resource and Referral Agencies.

1.2 CDA® CANDIDATE SELECTION OF A CDA PD SPECIALIST™

A candidate selects a CDA PD Specialist™ to conduct their CDA Verification Visit® in the following ways:

- When the candidate personally asks the PD Specialist to serve as their specialist. In this case, you will provide the candidate with your CDA PD Specialist™ endorsement number to include in their application.
- The candidate uses the *Find-a-PD Specialist Online Directory* to send an Inquiry of Availability email to check the availability of a local PD Specialist. You are expected to contact the candidate as soon as possible, but no later than 1 to 2 business days from the time you receive the email. If the candidate selects you, you will receive a confirmation email.
 - An email request from *YourCouncil* will be sent notifying you of the candidate's request for you to serve as their PD Specialist. **Please note that this is not the *Ready to Schedule* notice.** This notice is only to confirm that a candidate has sent a request; it does not authorize the PD Specialist to do anything other than contact the candidate to discuss their needs or to confirm availability to serve as the candidate's specialist.
- The candidate will ask the Council's ECE Observations team for assistance in locating a PD Specialist. The team will then reach out to a PD Specialist to determine their availability. If you receive a request, please respond to the ECE Observations team promptly, but no later than 1-2 business days hours from the time of receiving the email request.



1.3 DECLINING A CDA VERIFICATION VISIT®

When a candidate makes a request via email, you must let them know within 1-2 business days whether you accept or decline the request. Remember to always check the distance between your location and the candidate's workplace. If it is 100 miles or more one-way, ask the candidate to find another CDA PD Specialist™ (see section 5.3 for the remote travel policy). Your prompt response allows the candidate enough time to find another PD Specialist.

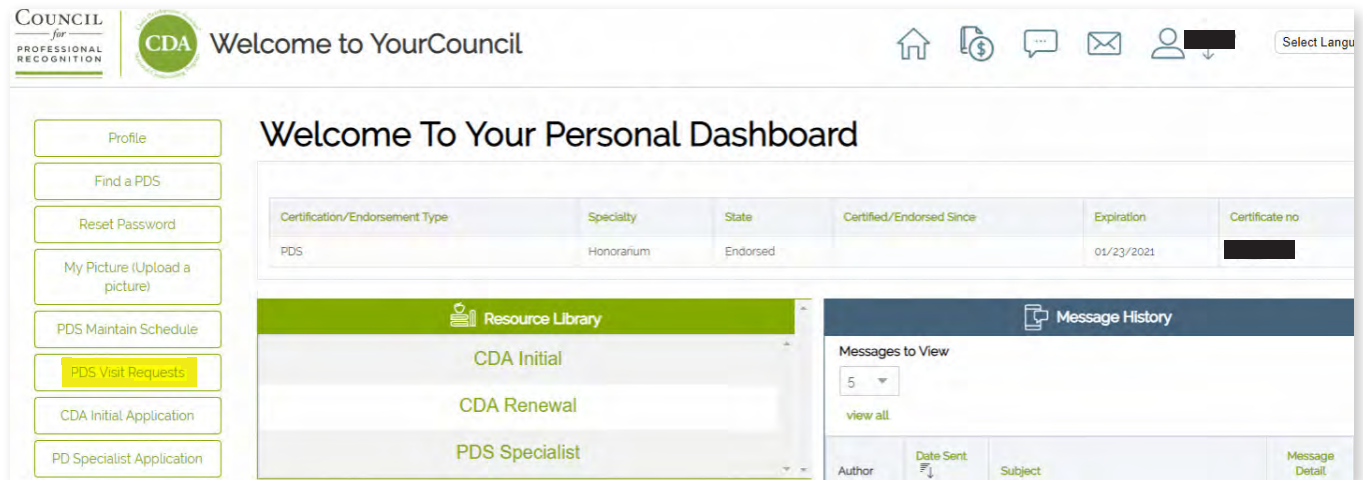


Ready to Schedule

When the candidate’s application is processed successfully, a *Ready to Schedule* (R2S) notice is sent via email to both the candidate and the CDA PD Specialist™. The message also appears in the Message History in *YourCouncil*.

Author	Date Sent	Subject	Message Detail	Attachments
ACGIAPPS	02/09/2021	CDA Verification Visit Request		
ACGIAPPS	02/08/2021	CDA Candidate Ready to Schedule		

If you are the selected CDA PD Specialist™, you will see the candidate's name in the *PDS Visit Request* tab in *YourCouncil*. At this point, you are authorized to schedule the CDA Verification Visit® and the candidate can schedule the CDA® Exam at a local Pearson VUE Testing Center. The candidate will have six months, from the time the candidate's name appears in the *PDS Visit Request* tab, to complete both the verification visit and exam. There are no exceptions to this rule. The exam may be completed before or after the verification visit. As a courtesy, please remind the candidate that they must complete their verification visit and exam within this six-month window.



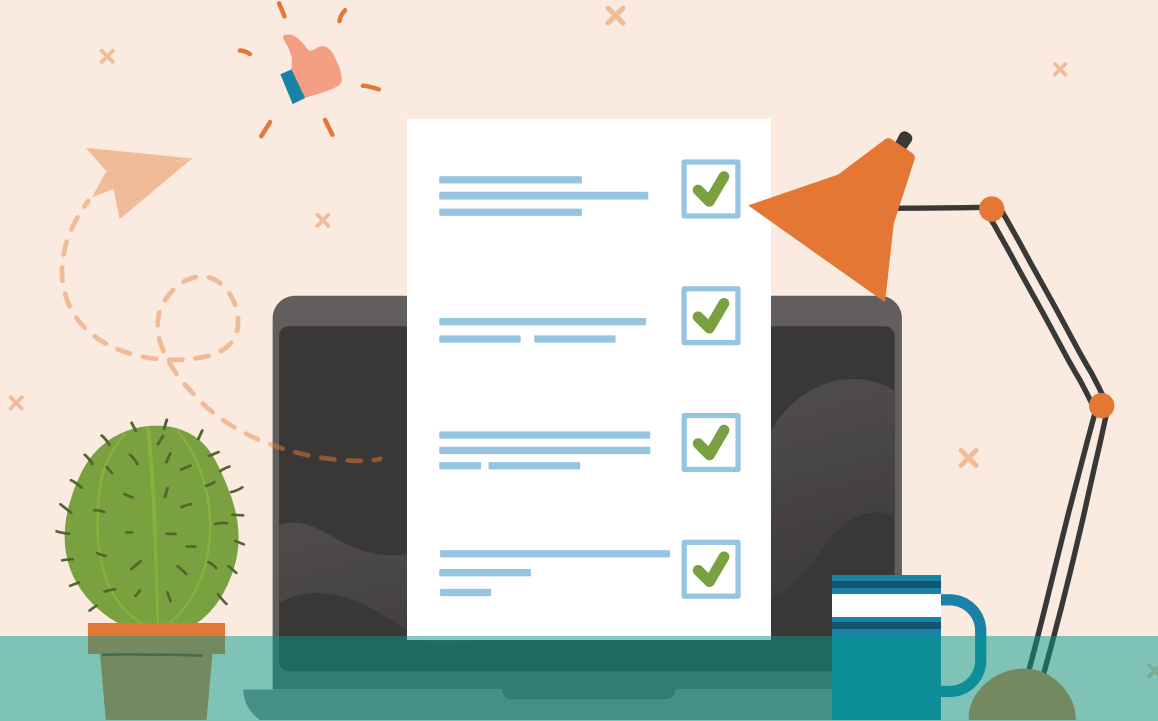
Scheduling the CDA Verification Visit®

As the selected CDA PD Specialist™, you may either Initiate a Request to Propose a Verification Date, or reply to the candidate's request. Once the date has been accepted by either the PD Specialist or the candidate, then the candidate's name will move to *Scheduled* allowing the PD Specialist to complete and submit the *Pre-Verification Visit Checklist* online. The *Pre-Verification Visit Checklist* must be completed at least 48 hours before the scheduled visit date via phone call with the candidate.

2.1 PRE-VERIFICATION VISIT CHECKLIST

Use the *Pre-Verification Visit Checklist*, located in the *PDS Visit Request* tab to document the specifics of the candidate's assessment and ensure proper preparation for the CDA Verification Visit®. During a conversation with the candidate, ask each of the questions listed on the *Pre-Verification Visit Checklist* and check off the appropriate line when gathering the information.

- **Verify the candidate's credential**—Ask the candidate the color of the CDA® *Competency Standards* book used to prepare for the assessment. Center-Based Preschool (**GREEN**), Center-Based Infant and Toddler (**YELLOW**), Family Child Care (**BLUE**) or Home Visitor (**PURPLE**).



- **Verify the candidate’s work setting and/or age group** (Center-based Preschool, Center-based Infant and Toddler, Family Child Care or Home Visitor).
- **Verify the number of children in the classroom/setting meets the observation standards in the table below.**
- **For bilingual and monolingual (language other than English) assessments, only Council-endorsed bilingual and/or monolingual (language other than English) PD Specialists may conduct these Verification Visits.**
- *Bilingual Language Specializations.* While speaking with the candidate, check to see if the candidate understands and can communicate effectively in both English and the other language. The PD Specialist may ask the candidate, “*Can you speak, read and write in both English and Spanish (or the other language) well enough to understand and be understood by others?*” Also engage the candidate in conversation to elicit verbal responses in both languages. If the candidate is unable to communicate in both languages, email the Council’s ECE Observations team (pds@cdacouncil.org) for assistance once you finish the conversation and do not submit the *Pre-Verification Visit Checklist*.
- Confirm the schedule for the CDA Verification Visit® including date, start time, location, length of each step in the R.O.R. Model®, and confirm that the candidate will be performing in the role of lead teacher for the duration of the observation.
- Confirm there are no program-wide events (i.e. field trips, celebrations, professional development, etc.) that impact the verification visit process.

Settings & Minimum Attendance for CDA Verification Visits®:

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

* State-approved child development center or home visitation program

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

*** Not necessarily in the candidate's group

It is important to put the candidate at ease right from the start by making it clear that there is total transparency during the entire assessment. You should give a detailed explanation of your role during the verification visit and make it clear that all information shared during the evaluation is kept confidential.

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

If the candidate indicates there is a problem with any of the items, do not move forward with the scheduled visit. Contact the Council's ECE Observations team (pds@cdacouncil.org) to receive further instructions.

2.2 REQUEST DIRECTIONS TO THE SITE

We suggest you obtain the full address and phone number of the assessment site from the candidate to avoid any delays in finding the location. It is also a good idea to research directions before going to the site and also confirm parking and other accommodations as needed. These steps will help prevent any delays that could make it necessary to reschedule the entire evaluation.

2.3 CONTACT THE PROGRAM DIRECTOR

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

- Introduce yourself and show appreciation for their support of the candidate.
- Inform the director of the schedule arranged with the candidate and answer any general questions about the CDA Verification Visit®.
- Confirm with the director that the candidate:
 - Has arranged for a private place to conduct the Professional Portfolio review and reflective dialogue
 - Confirm candidate will serve in the lead teacher role during the visit
- **Emphasize that all assessment information is confidential between the candidate and the Council.**

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

2.4 COUNCIL SUPPORT WITH SCHEDULING ASSESSMENTS

If you have any issues with a candidate's *Pre-Verification Visit Checklist*, do not submit the checklist and contact the Council's ECE Observations Team at pds@cdacouncil.org. The Council will provide further instructions and guidance. The following list contains some common scenarios that may require guidance from the team:

- Inability to reach a candidate to conduct the *Pre-Verification Visit Checklist* interview (e.g., incorrect phone number or email address).
- A candidate does not speak, read and/or write the language of the assessment well enough to proceed.
- Uncertainty about a conflict of interest (See *Role of the CDA Professional Development (PD) Specialist™* on [page 7](#))

- The credential type and/or language specialization does not match.
- Conducting a CDA Verification Visit® before the *Ready to Schedule* notice. This action will make the verification visit invalid and require the candidate to select another PD Specialist. PD Specialists who conduct a verification visit without a *Ready to Schedule* notice will not receive the honorarium payment. We strongly advise to carefully monitor the *PDS Visit Request* tab before scheduling the verification visit.



CDA Verification Visit[®]

3.1 CDA VERIFICATION VISIT[®] PREPARATION

Prior to the CDA Verification Visit[®], you should always:

- Review the setting-specific *CDA[®] Competency Standards* book and the 13 Functional Areas in this manual.
- Review the format of the *Comprehensive Scoring Instrument (CSI)* to become comfortable and totally familiar with all 51 items and indicators.
- Rehearse the reflective dialogue process. We recommend that you practice the process. We do not require you to follow the suggested script verbatim during the verification visit.
- Review your copy of the *Pre-Verification Visit Checklist* for reference. *Note: the PD Specialist must complete the checklist in YourCouncil since photocopies are prohibited.*
- Perform a “practice” observation using a copy of the CSI to become acquainted with the tool. The PD Specialist is required to use the original CSI from the candidate’s *CDA[®] Competency Standards* book.
 - Make sure you arrive on time for the verification visit: Review the directions to the site and estimate your travel time.
 - Allow extra time for unforeseen delays.

3.2 CDA VERIFICATION VISIT® LOCATION

A CDA PD Specialist™ must observe a CDA® candidate in the center, home or other program where they are currently employed or volunteering. You cannot ask a candidate to travel to another program for a CDA Verification Visit®.

3.3 NECESSARY FORMS AND DOCUMENTS

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

- Your photo identification
- Writing tools and supplies
- The Council's ECE Observations Team contact information:
 - Customer Support (800) 424-4310
 - pds@cdacouncil.org

3.4 ARRIVING AT THE SITE

You must arrive at the CDA Verification Visit® on time and dressed in professional attire since you are representing the Council. If an emergency makes you late to the site, you should notify the candidate immediately and the center director, if possible. If the candidate does not arrive at the site within 15 minutes of the scheduled time for the verification visit, you should contact the Council's Customer Support team at 800-424-4310 as soon as possible. Do not enter the "No Show" code in the CSI until you hear from the Council.

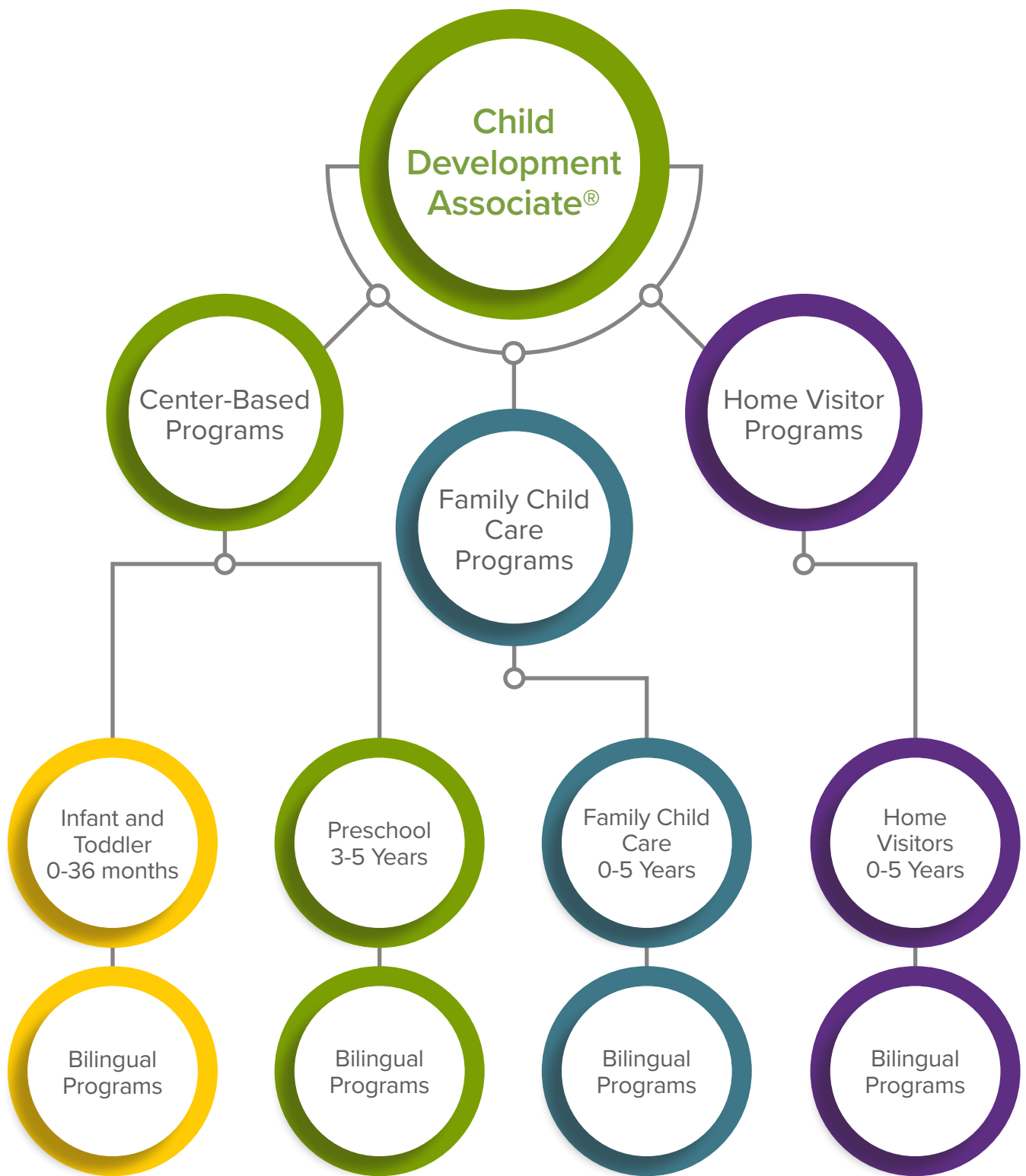


A typical arrival scenario is as follows:

- Present your photo identification and introduce yourself to the candidate and director. Locate the workspace and secure your belongings.
- After validating the candidate's identification, review the CDA Verification Visit® schedule to follow the R.O.R. Model®.
- Accept the candidate's observation materials (*CDA® Professional Portfolio* and setting-specific *CDA Competency Standards* book). **The candidate must have an original book with the original *Comprehensive Scoring Instrument (CSI)* intact.** Photocopies of the book are not allowed.
- If needed, clarify with the candidate where you will meet for the reflective dialogue once you have completed the review and observation.
- **If the setting does not correspond with the one provided by the Council** but does correspond with the candidate's *CDA Professional Portfolio*, proceed with the verification visit. However, **DO NOT ENTER SCORES!** Please contact the Council's Customer Support team at 800-424-4310 to report the discrepancy and await further guidance from the Council's ECE Observations team.
- **If the setting does not match the candidate's *CDA Professional Portfolio***, do not proceed with the visit. Please contact the Council's Customer Support team at 800-424-4310 to report the discrepancy and await further guidance from the Council's ECE Observations team. PD Specialists can help to avoid this scenario by properly completing the required checklist during the *Pre-Verification Visit Checklist* conversation.
- **If the candidate does not have their *CDA Professional Portfolio***, please inform them that you will continue with the observation portion of the verification visit. But you will need to return to review the portfolio and conduct the reflective dialogue within the seven-day R.O.R. window. If you are unable to accommodate the candidate within the seven-day window, please stop the visit. You should inform the candidate that they will have to contact the Council to reauthorize another verification visit. In this case, please contact the Council's Customer Support team at 800-424-4310 to report the issue and await further guidance from the Council's ECE Observations team.

3.5 CDA® CREDENTIAL SETTINGS

Identifying the setting for each CDA Verification Visit® is critical to a seamless assessment. Please view the following chart of the CDA® credential settings. Detailed information on each of the settings can be found in the *Helpful Documents* section on [page 72](#) of this manual.





3.6 SPECIAL EDUCATION PROGRAM

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

3.7 PORTFOLIO REVIEW PROCESS

The purpose of the review is to provide the CDA PD Specialist[™] time to study the candidate’s prepared professional materials and is one way of collecting information to support the CSI scores. You can schedule the review before or after the candidate’s observation so long as you do it in a private area. Under no circumstances should you take the candidate’s CDA[®] *Professional Portfolio* home to review. The candidate’s professional portfolio consists of a collection of documents portraying the candidate’s ability to meet all CDA eligibility requirements. The portfolio provides a compilation of the candidate’s reflections on how their practice meets the CDA Competency Standards.



The professional portfolio consists of:

- Divider/cover sheets (3)
- Official training documentation
- Family Questionnaires
- Reflective Statements of Competence (6)
- Resource Collection (10)
- Reflective Professional Philosophy Statement

See [page 85](#) for a detailed list of the portfolio's contents for the Preschool, Infant and Toddler and Family Child Care settings. The portfolio contents for the Home Visitor setting can be found on [page 119](#) of this manual.

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

3.8 REQUIREMENTS FOR THE REVIEW

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

3.9 ORGANIZATION OF THE PROFESSIONAL PORTFOLIO

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

The organization of the contents requires use of the divider/cover sheets that are provided to all candidates as perforated pages in the back of their *CDA® Competency Standards* book. Using the cover sheet *My CDA® Professional Portfolio* as the portfolio index, the candidate follows the outline provided to present the contents of specific tabbed sections in sequence.

After completing the professional portfolio, the candidate must sign and date the cover sheet, attesting that the contents are valid and meet all requirements. Please see the *Helpful Documents* for an overview of the tabbed sections of the portfolio for the Preschool, Infant and Toddler and Family Child Care settings on [page 85](#) of this manual. The portfolio contents for the Home Visitor setting can be found on [page 119](#) of this manual.

3.10 DOCUMENTATION OF EDUCATION REQUIREMENTS

Every CDA® candidate must complete 120 clock hours of professional early childhood education, with no fewer than ten hours in each of the eight CDA® Subject Areas. Candidates may obtain training through two- and four-year colleges, private training

organizations or high school Career and Technical Education (CTE) programs. Resource and Referral Agencies and early childhood education programs, such as Head Start and the U.S. military, are also sources for training.

A candidate may accumulate the hours from a single training program or a combination of programs. Each agency or organization must provide verification of all education in the form of a transcript, certificate or letter on official letterhead. For online CDA® training, electronic certificates are acceptable. The Council accepts in-service training and training from Council-approved state registries, but it **does not accept training obtained at conferences nor from individual consultants**. Please see the *Training Documents Guidelines*, as well as the *Summary of My CDA® Education* checklist for more details.

4.0 FAMILY QUESTIONNAIRES

As the CDA PD Specialist™, you will need to review the *Family Questionnaires Summary Sheet*. It recaps the responses to all the questionnaires the candidate distributed to families that they served. Information on the families' perceptions of the candidate's strengths and areas needing professional growth are crucial to the CDA® credentialing process. To ensure the accuracy of this feedback, you are required to:

1. Verify the total number of questionnaires collected matches the number written on the *Family Questionnaire Summary Sheet*.
2. Ensure the candidate received responses to at least 51% of the questionnaires they distributed to families, but do not read through the questionnaires.
3. Confirm the areas of strength and professional growth are entered on the *Family Questionnaires Summary Sheet* and on the *CDA Verification Visit® Reflective Dialogue Worksheet*. This feedback is considered during the reflective dialogue portion of the verification visit as you guide the candidate to set professional goals for themselves.

An example of the *Family Questionnaires Summary Sheet* is provided in the CDA® *Competency Standards* book, in the *PDS Resource Library* and on [page 88](#) of this manual.

4.1 RESOURCE COLLECTION

The *Resource Collection* is comprised of early childhood resources the candidate has collected for the portfolio. It is one of the most valuable components of their

portfolio because it constitutes the basis for the candidate's *Reflective Statements of Competence*. The information gathered in the *Resource Collection* includes experiences, activities and resources the candidate uses in their daily practice.

4.2 THE REFLECTIVE STATEMENTS OF COMPETENCE

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

CDA PD Specialists™ should use their professional judgment in determining whether the candidate's *Reflective Statements of Competence* meet the requirements set forth by the Council in the *CDA® Competency Standards* book. It is natural and expected for CDA PD Specialists to vary in their opinions, interpretation of statements, and scoring. You should trust and rely on your own professional judgment so long as a candidate's statements meet the established requirements. Be sure to evaluate each candidate's work individually and avoid comparing candidates with one another.

4.3 REVIEWING THE CANDIDATE'S REFLECTIVE STATEMENTS OF COMPETENCE

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

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

- These statements form a foundation of information that you may later draw on in the reflective dialogue discussion.
- Your comments should be concise and to the point when conveying the candidate's individual reflection on their practices.

- You should record what is missing in the statements. Evaluate how the statements address the *CDA*® *Competency Goals* through personalized goals and individual activities designed for the children and families with whom the candidate works. **Note: *CDA PD Specialists*™ do not evaluate grammar and sentence structure, but rather the message and relevant content within each statement.**
- When reviewing *Reflective Statements of Competence*, record all comments in the notes section in the *CSI*, not on the statements themselves.

Note: For bilingual language (English and another language) assessments:

- The six *Reflective Statements of Competence* must include information on the candidate's bilingual activities and goals.
- Three reflective statements should be in the other language (not English).
- Three reflective statements should be in English.
- Within the *Resource Collection*, resource items RC 1-3, RC II, RC III, RC IV must be provided in both languages.
- The *Professional Philosophy Statement* may be in either language.

4.4 RECORDING PROBLEMS WITH REFLECTIVE STATEMENTS OF COMPETENCE

If the information you are reviewing is not appropriate or missing, just note the problem on the *CSI* tool on page *CSI-20*. **Do not explain, question or share with the candidate the status of their documentation. In either case, there is no need to call the Council.**

4.5 PROFESSIONAL PHILOSOPHY STATEMENT

The *Professional Philosophy Statement* is the final reflective task in designing the *CDA*® *Professional Portfolio*. In it, candidates summarize their beliefs about early childhood education and the values they hold in the field. The *Professional Philosophy Statement* should be no more than two pages in length or about 500 words.

The candidate identifies personal values and beliefs about teaching and learning by answering a question: "How do young children learn?" Based on their answer, the candidate should then respond to another question: "What does the candidate believe their role is?" Answering this question gives the candidate a chance to write about aspects of the role they play, besides teacher, in the lives of children and families.

Remember, you should not critique the *Reflective Statements of Competence* and the *Professional Philosophy Statements* for grammar, spelling or punctuation. You should also refrain from counting the number of words, though the candidate should try to confine their response to two typed pages.

4.6 CONDUCTING THE OBSERVATION

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

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

4.7 RECORDING EVIDENCE

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

Sources of evidence consist of teacher-child interactions, materials and equipment used by the candidate, review of the portfolio and examination of the environment. You must make notes for each section. When using the CSI during your observation, you must also record your comments in the appropriate note boxes, and your comments should be specific to the individual candidate.

Be objective in your observation of the candidate. Don't penalize candidates for circumstances or situations beyond their control. For example, don't penalize a candidate if a center has a limited number toys for children. Instead, focus on the candidate's abilities to manage the environment by making the best possible use of the toys available.

Refer to the *Checklist for the Observation* in this manual.

4.8 REFLECTIVE DIALOGUE

The reflective dialogue is the last step in the R.O.R. Model® for the CDA Verification Visit®. The dialogue should take at least one hour, and conducted in a private space protected from interruptions. The materials you need for the reflective dialogue are:

- The candidate's partly completed *CDA Verification Visit® Reflective Dialogue Worksheet*
- The candidate's *Professional Philosophy Statement*

Time approximations can be found on [pages 91-92](#) of this manual.

At the end of the session, the candidate must have a completed a confidential *CDA Verification Visit® Reflective Dialogue Worksheet* that identifies areas of strengths and professional growth, and up to three goals and action plans to achieve the desired professional growth.

4.9 REFLECTIVE DIALOGUE PROCESS

- The purpose of the dialogue is to support the candidate's development of skills in the areas of professional reflection and goal setting.
- Set a relaxed tone for the dialogue to minimize the candidate's anxiety and to help them feel more comfortable.
- Be sure that the candidate understands this process is a conversation to assist them in setting their future professional goals.
- You are required to follow the preset agenda but may include additional questions if you feel you need more information to complete scoring in the *Comprehensive Scoring Instrument*.
- Encourage a thoughtful, reflective conversation by accepting and acknowledging the candidate's answers without making judgments.
- The reflective dialogue receives NO score or rating because it is and remains the culmination of the professional development experience.
- For bilingual assessments, the CDA PD Specialist™ conducts the reflective dialogue in both languages. For monolingual assessments in a language other than English, the CDA PD Specialist conducts the reflective dialogue in the language of the assessment.

- Conclude the reflective dialogue with the completion of the *CDA Verification Visit® Reflective Dialogue Worksheet*, which the candidate retains to guide future professional development.
- You must return the signed *CDA Verification Visit® Reflective Dialogue Worksheet* with completed action plan and *CDA® Professional Portfolio* to the candidate.

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

Review the *Agenda for the Reflective Dialogue with a CDA® Candidate* on [page 91](#) and on [page 121](#) for home visitor CDA candidates.

Once the CDA Verification Visit® is over, inform the candidate that your role as their CDA PD Specialist™ is ending. The candidate must discard your contact information and the two of you should have no further contact. If the candidate needs to inquire about their credentialing status or has any further questions about the verification visit, they must contact the Council's Customer Support at 800-424-4310.



Special Circumstances

5.0 SPECIAL CIRCUMSTANCES

The following scenarios require the Council to provide specific arrangements for CDA® candidates:

- Administering paper exams for candidates who have been pre-approved to be assessed in a language other than English or Spanish and for candidates in remote locations where there is no Pearson VUE testing center.
- CDA exam and/or assessment accommodations for candidates with disabilities, honoring the Americans with Disabilities Act (ADA)
- Pre-approved remote travel for CDA PD Specialists™ conducting CDA Verification Visits® more than 50 miles each way. For detailed information about remote travel, please see the *Eligibility for Remote Travel* section below.

5.1 ADMINISTERING THE CDA® PAPER EXAM TO CANDIDATES For Remote Candidates

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

For Candidates Applying in Another Language (Monolingual, Language other than English or Spanish)

The CDA PD Specialist™ will interpret the CDA paper exam for the candidate. The CDA® paper exam consists of 60 multiple-choice questions, which the PD Specialist reads in the language of the assessment. The candidate will have two hours to complete the exam.

Refer to the process for *Facilitating a CDA Verification Visit® for Monolingual and Bilingual Candidates* on [page 93](#).

Location of Exam

The CDA® exam must take place in a quiet, comfortable environment where there are no interruptions and where adult size chairs and tables are available. Appropriate sites include a private room in the candidate's program, a private room at the local library, private office space at a Resource and Referral Agency or a college meeting room. Family child care exams require space other than in the provider's home. Privacy and the absence of interruptions are important. The family child care home or any home should only be used as a last resort or when there is an emergency. Should this be the case, the Council's ECE Observations team must be notified prior to the exam date.

Note: *Number 2 pencils are required to take the exam. It is recommended for you to bring extra pencils to the exam.*

Before the Exam

You will greet the candidate upon arrival. Allow 20 minutes for giving instructions, and two hours for the candidate to take the exam.

- You should let the candidate know that once the exam starts, they cannot leave the room until they have finished the exam.
- No visual aids, such as notes, dictionaries or thesauruses, are allowed.
- Everyone must turn off personal mobile devices during the entirety of the exam.

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

Administering the Exam

- Place a "Do Not Disturb" sign on the door to avoid any interruptions and keep all doors to the room closed.

- Give the sealed exam to the candidate and ask them to break the seals on the exam.
- Help the candidate to complete the information on the first page.
- **Recite the following instructions to candidates:** *“You will have two hours to complete the exam. If you finish before the two hours, we may help you check your exam over and re-read any questions you may have skipped. Or you may turn in your test early if you wish. Once given to me, I cannot return it to you for any reason. The exam consists of 60 multiple-choice questions. I will translate the questions and answers in _____ (other language) for you. You will select the best of the four answers for each question by darkening the oval next to the answer you consider to be the correct one. You should listen to each question and the answers carefully before you choose. I cannot help you answer any test questions or explain the questions in any way. Do you have any questions before we begin? Are the instructions about the exam clear to you?”*
 - Facilitate practice of the sample questions using the second page of exam. Read each question in the other language. Then the candidate selects the answer they consider to be as the correct one. You may answer any questions the candidate has about the sample questions **only**.
 - At the completion of the practice sample questions, ask the candidate to STOP before turning the page.
 - Once the practice is finished, the exam time begins.
 - You must remain in the room with the candidate at all times.
 - Record the start and end times of the exam at the bottom of the form.
 - For the actual exam follow the same procedure as you did for the sample questions. Read each question in English, provide time for the interpreter to translate for the candidate what you read. The candidate selects the answer they consider to be the correct one for each of the 60 questions.
 - Provide a one-hour and a ten-minute warning before the two-hour period is over. If the exam time goes a little over the two hours, do not worry. Instead, use your professional judgment and avoid rushing the candidate.
 - Return the exam in the pre-paid envelope provided by the Council. Please take the envelope to the post office and hand it to a postal agent. Do not drop it in a street mailbox since the post office may destroy it.

5.2 CDA® EXAM SPECIAL ACCOMMODATIONS

The Council offers reasonable accommodations to candidates with disabilities working towards earning a CDA® credential. Accommodations fall under the Americans with Disabilities Act (ADA), and its mission is to “make it possible for everyone with a

disability to live a life of freedom and equality.” As stated by the ADA, an individual with a disability requiring an accommodation must be otherwise qualified to apply for the CDA credential and inform their employer of the disability. Also, the Council is not required to make an accommodation if it would impose an “undue hardship” on the operation of the CDA assessment system. Alternatively, as stated by the candidate’s employer, the assessment must not impose an “undue hardship” on the functioning of the early childhood program and/or the children served.

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

Requesting ADA Accommodations for CDA® Exam

Candidates needing special accommodations must submit a request in *YourCouncil* and upload the required documentation to support their request. Upon completing this request, the candidate will not be able to proceed until the Council has approved accommodation. If the candidate is submitting a paper application, they must submit a *CDA® Exam Special Accommodations Request Form*, which can be downloaded from the Council’s website at www.cdacouncil.org/resources/downloadable-forms. Candidates must submit the *CDA® Exam Special Accommodations Request Form* along with a copy of documentation supporting the request directly to accommodations@cdacouncil.org.

Official Council Approval

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

Candidates completing applications in *YourCouncil* will receive an email with official approval of their special accommodations request.

Candidates who submit a paper application will receive the *CDA® Exam Special Accommodations Request Form* and a letter with specific instructions from the Council BEFORE submitting the application. Candidates are required to attach a copy of the approved *CDA® Exam Special Accommodations Request Form* to their paper application.

5.3 PRE-APPROVED REMOTE TRAVEL PROCEDURES

Remote Travel Overview

Remote travel approval may be required when a CDA® candidate's center or location is more than 50 miles (one-way) from the nearest CDA PD Specialist™. In these instances, a PD Specialist may be approved to travel to conduct a candidate's CDA Verification Visit® and the Council will reimburse the PD Specialist for travel, meals and lodging (if required), in connection with the verification visit.

There are instances where the CDA candidate requires a specialization (i.e., language, special accommodations or endorsement) and the most appropriate PD Specialist to conduct the verification visit is more than 50 miles away. In these cases, remote travel approval is required.

A PD Specialist may be contacted either by the CDA candidate or the Council requesting a remote travel verification visit. If you receive a request from a candidate, you must reach out to the Council's ECE Observations team at pds@cdacouncil.org for approval prior to accepting the visit.

Eligibility for Remote Travel

- The candidate has attempted to locate a local CDA PD Specialist™ using the *Find-a-PD Specialist Online Directory* and is unable to find one within a 50-mile radius.
- The Council has confirmed there are no PD Specialists located within a 50-mile radius of the candidate's work. The Council has verified the selected PD Specialist as the closest available by conducting an additional search.
- A PD Specialist has been contacted and agrees to perform the CDA Verification Visit®.
- The Council has approved the remote travel required.

Authorization and Responsibility

The Council must authorize and approve all remote travel. A CDA PD Specialist™ **cannot** approve or authorize their own remote travel or conduct CDA Verification Visits® without adhering to the Council's procedures and processes (including completing a



Pre-Verification Visit Checklist for each CDA candidate). The PD Specialist must use the Council's *PDS Remote Travel Expense Voucher* for reimbursement and maintain all original receipts. The *PDS Remote Expense Voucher* expires in six months from the date of approval. The Council reserves the right to re-evaluate the authorization at any time prior to the verification visit.

It is expected that the PD Specialist will:

- Make all travel arrangements at least 30 days in advance
- Incur the lowest fare(s)
- Purchase economy or coach class tickets.

The Council reviews all expenditures and may withhold any reimbursement(s) if there is reason to believe that the expenditures are inappropriate or extravagant.

Travel Procedures

All remote travel must be preapproved prior to planning arrangements and paying for any expenditures.

- **Airfare and Rail Transportation:** CDA PD Specialists™ are expected to secure the lowest available airfare that reasonably accommodates their travel needs. The Council strongly encourages PD Specialists to book flights at least 30 days in

advance to avoid premium air fare. They must purchase coach or economy tickets. The Council does not reimburse first-class or business-class airfare.

- **Use of Vehicles:**

- **Rental Vehicles:** The Council will reimburse for the use of a standard rental car.
- **Personal Vehicle Use:** The Council will provide compensation for the use of a personal vehicle. The reimbursement rate is \$0.655/mile. The driver must have a valid driver's license and automobile insurance. The driver should be aware of the extent of coverage provided by the automobile insurance policy.
- **The Council advises the PD Specialists to follow all laws and regulations governing driving.**

- **Miscellaneous Transportation:** The Council will reimburse for taxi, public transportation (subway, bus), ferry and other modes of transportation used in association with the verification visit.

All original receipts must accompany the *PDS Remote Expense Voucher* form.

Inclement Weather

Arriving safely to the CDA Verification Visit[®] location is a priority. If weather creates hazardous road and/or driving conditions, the CDA PD Specialist[™] should reschedule the verification visit. If the verification visit is rescheduled due to inclement weather, the PD Specialist must:

- Immediately call the CDA[®] candidate and the center notifying them of the cancellation and rescheduling.
- Contact the Council in writing by submitting an email to: pds@cdacouncil.org explaining why the visit was canceled and include the new date.

Use of Personal Funds

The CDA PD Specialist[™] must prepay all travel costs and will not be reimbursed until after the trip occurs and the Council receives all travel vouchers and receipts.

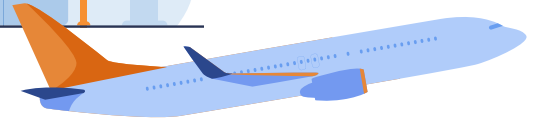
Reimbursements

Requests for travel-related reimbursements must be included on the *PDS Remote Expenses Voucher* form. All original receipts substantiating travel costs must be included and submitted to the Council within 1-2 business days of submitting the verification visit scores. If the expenses exceed the allowable amount, the CDA PD Specialist[™] must obtain the Council's approval.

SUBWAY & RAIL



AIRPLANE



TAXI & OTHER VEHICLES



BUS



FERRY



Tolls/Parking Fees:

- The Council will reimburse for toll costs and parking fees related to the remote CDA Verification Visit®. The receipts must include locations and dates and be within the same travel timeframe for reimbursement.

Per Diem:

- Daily per diem allowances are provided during the remote verification visit over 100 miles (one way). The amount of the per diem is provided based on departure and return times over an **entire 24-hour day** and is prorated accordingly. The per diem covers meal costs, but it does not cover alcohol consumption or anything beyond the per diem rate.

Lodging:

- A PD Specialist may require overnight accommodations when visiting some remote travel locations. In this case, the time needed to conduct and travel to a verification visit exceeds a normal work day. If a PD Specialist's accommodations do not fit as defined above, then they must notify the Council.
- The Council will reimburse the cost of overnight accommodation. The reimbursement covers room and tax only.

Moving Violations/Parking Tickets:

- The Council does not reimburse for moving violations nor parking tickets.

The *PDS Travel Voucher* form must include all receipts for allowable reimbursements.

Non-reimbursable Travel Expenses

The Council does not reimburse the following items:

- Travel upgrades (air, rail, auto, etc.)
- Travel club memberships
- Child care, house-sitting, pet-sitting, kennel charges
- Laundry and/or dry cleaning
- Reservation cancellation fees
- Entertainment (headsets, in-flight/hotel movies, etc.)
- Additional person(s) traveling with CDA PD Specialist™

Procedures for Remote Travel

Candidate contacts CDA PD Specialist™ for a remote visit:

If a candidate contacts a PD Specialist who is **more than 50 miles away**, the PD Specialist must verify that the distance from their location to the candidate is 50 miles or more. (*Note: We recommend using the CDA PD Specialist™ search portal or Google Maps to calculate the distance.*) The PD Specialist must accept or deny the request within 1 to 2 business days.

1. If mileage meets the 50-mile minimum or more, the PD Specialist must contact the ECE Observations team via email at pds@cdacouncil.org with the subject line: *Remote Travel Inquiry*. The email must include the following information:
 - a. Candidate's first and last name and contact information (i.e., phone and email)
 - b. Program and language setting
 - c. Program's full address, including the zip code

2. After receiving the above information, the ECE Observations team will verify and follow-up in writing within 1 to 2 business days by approving or denying the inquiry. Once the PD Specialist receives approval or denial of their remote travel request, the PD Specialist must follow-up with the candidate regarding the outcome.
3. If the ECE Observations team approves the inquiry, the PD Specialist will create a projected travel expenses budget for the Council's approval.
4. Once the travel request is approved and the verification visit is scheduled, the team will send the PD Specialist an email with a completed *PDS Remote Expense Voucher*.
5. The PD Specialist travels and conducts the verification visit according to the Council's policies and procedures.
6. At the end of the verification visit, the PD Specialist submits the remote travel expense form along with all receipts within 1 to 2 business days of submitting the scores. Failure to remit the form and receipts will cause a delay in payment.
 - a. To submit the Remote Travel Expense form
 - i. Email the completed form, including all receipts for reimbursement. You may scan receipts to send as an email attachment.
 - ii. Email to: pds@cdacouncil.org

Council contacts CDA PD Specialist™ for a remote visit:

If the ECE Observations team contacts a PD Specialist to serve a remote CDA® candidate, you have the option to accept or decline the request by responding to the team within 1 to 2 business days. If you accept the request sent by the team:

- Projected travel expenses are completed by the ECE Observations team for Council approval.
- Once the travel request is approved, the team will send the PD Specialist an email with a completed *PDS Remote Expense Voucher*. The ECE Observations team will contact the candidate to provide the name, phone number, email, and PDS endorsement number of the approved and available PD Specialist to add to their application.
- The PD Specialist travels and conducts the CDA Verification Visit® adhering to the Council's policies and procedures.
- Upon completion of the verification visit, the PD Specialist submits the remote travel expense form along with all receipts within 1 to 2 business days of submitting the scores.
 - To submit the *PDS Remote Travel Expense* form:

- Email the completed form including all receipts for reimbursement. You may scan receipts to send as an email attachment.
- Email to: pds@cdacouncil.org

Reimbursements are processed and issued within 30 business days of submission.

Denials

The request for remote travel will be denied if:

- Another CDA PD Specialist™ is located closer to the CDA® candidate.
- A PD Specialist with previous violations submits a travel authorization request.
- A PD Specialist refuses to adhere to the Council's policies and procedures.

Note: *The Council only reimburses travel expenses for CDA Verification Visits® that receive **advanced approval** from the Council's ECE Observations team. The Council does not reimburse retroactively any travel expenses that have not been approved.*

Meals & Incidentals Per Diem Rates

Per diem rates are set by U.S. General Services Administration and based on the city and state of the Verification Visit. Rates can be found by accessing www.gsa.gov/travel/plan-book/per-diem-rates.

Note: *Overnight hotel accommodations are only included if deemed necessary and approved by the Council's ECE Observations team.*



After the CDA Verification Visit[®]

6.2 SUBMITTING CANDIDATE SCORES

Once the CDA Verification Visit[®] has concluded, you can submit the candidate scores online in *YourCouncil*. The *Comprehensive Scoring Instrument (CSI)* is found in the *PDS Visit Request* tab on the left-hand side of the menu on your personal dashboard. You will not have access to the *CSI* unless the *Pre-Verification Visit Checklist* is completed first. You are required by the Council to submit the candidate's scores electronically in the *YourCouncil CSI* within 1 to 2 business days after the visit. You will need the hard copy of the *CSI* that you removed from the back of the candidate's *CDA[®] Competency Standards* book. Your candidate's scores must be submitted electronically in *YourCouncil*.

You will need to click on the *Visit Checklist* link by the candidate's name to access the *CSI*. You will enter the candidate's scores, along with your comments, in the next three sections. Once the tool is open:

- Confirm that the name at the top left of the page is the correct candidate's name.
- Confirm that the credential type and language of assessment, including specialization, are correct.
- Be sure to provide the exact date for the review and the exact date for the candidate observation. Month names are not acceptable; you must use numeric dates. Please follow the directions precisely (ex. mm-dd-yyyy).
- In order to complete a candidate's scoring submission, you will need the completed *Comprehensive Scoring Instrument (CSI)* that you removed from the candidate's *CDA Competency Standards* book at the end of the verification visit.
- After the initial three questions that confirm the verification visit was completed successfully (setting, language and portfolio), this tool follows the same order of as the *Items* in the CSI, which will allow you to submit scores quickly and efficiently.
- For each *Item*, enter a score of one (1) if you found little or no evidence of competency related to this Item; two (2) if you found some evidence and three (3) if you found a great deal of evidence. Remember that the score you choose is based on the evidence you found in the candidate's portfolio and/or during your observation.
- Add any notes in the "Notes Box" that follows each Item score. If you entered a one (1) or a two (2) on any Item, you will be required to add a note explaining the reason you chose this score. Your notes will be critical if a candidate is denied the CDA credential and seeks an appeal.
- The online scoring tool is laid out in the exact same order as the CSI so that you can quickly follow the hard-copy document used in the candidate's CDA Verification Visit® by transferring the scores and any written notes in order as required.
- You should read the directions thoroughly to avoid any problems in submitting scores.
- Please remember to review each screen page and double check entries prior to proceeding. The electronic signature requirement at the end of the document is where you confirm that there is NO conflict of interest or violation of Council policies and procedures between you and the candidate.
- The online *YourCouncil CSI* ratings must be completed in their entirety.

The *CSI* scores must be kept confidential. Once the recommended scores have been submitted in *YourCouncil*, **you are required to keep the hard copy for one year.**

Honorarium

7.1 PAYMENTS AND EXPENSES

Being a CDA PD Specialist™ is a contribution to our profession that cannot be adequately compensated. In recognition of your service, the Council offers CDA PD Specialists a \$100 honorarium for each successfully completed CDA Verification Visit®. If you administer a CDA Paper Exam for a candidate, you will receive an additional \$100 honorarium payment, once the exam is received by Council.

The honorarium payment automatically generates when you electronically submit the *CSI* scores in *YourCouncil*. The Automated Clearing House (ACH) deposit agreement must be completed prior to receiving the honorarium. Upon completion of your first verification visit, you will be prompted to complete the PD Specialist vendor information. This is required before you submit the *CSI*.

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

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

Note: *Volunteer CDA PD Specialists™ are not compensated. Agency CDA PD Specialists™ are also not compensated by the Council. Instead, the agency receives the honorarium on the specialist's behalf.*

CDA PD Specialist™ Agreement

It is important to carefully review the CDA PD Specialist™ agreement, which clearly defines your relationship with the Council. A copy of the agreement appears on [page 152](#) of this manual. If, for any reason, you need to end your relationship as an independent contractor of the Council, please inform us in writing at pds@cdacouncil.org.



The Home Visitor CDA Professional Development (PD) Specialist™

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

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

BEFORE THE CDA VERIFICATION VISIT®

1. Candidate selects you as a possible Home Visitor CDA PD Specialist™ for their CDA Verification Visit®. You will receive an inquiry from the candidate.

- a. Inform the candidate whether or not you can serve as their Home Visitor CDA PD Specialist™ within 1 to 2 business days.
- b. If you agree to serve as the CDA PD Specialist™, you will need to provide the candidate your CDA PD Specialist™ endorsement number for their CDA® application.
- c. Candidate submits application with payment to the Council.

DO NOT schedule the CDA Verification Visit® until the candidate's name appears in the *PDS Visit Request* tab in *YourCouncil*.

READY TO SCHEDULE

1. When the candidate's application is processed successfully, a Ready to Schedule (R2S) notice is sent via email to both the candidate and the CDA PD Specialist™. The message also appears in the Message History in *YourCouncil*.

2. At this point, you are authorized to schedule the CDA Verification Visit® and the candidate can schedule the CDA® Exam at a local Pearson VUE Testing Center. The candidate will have six months, from the time the candidate's name appears in the *PDS Visit Request* tab, to complete both the verification visit and exam. The exam may be completed before or after the verification visit. Once the candidate appears in your *PDS Visit Request* tab, you may either Initiate Request to propose a verification date or reply to the candidate's request.

3. Once the CDA Verification Visit[®] has been scheduled, use the *Pre-Verification Visit Checklist*, located in the *PDS Visit Request* tab, to document the specifics of the candidate's assessment and ensure proper preparation for the CDA Verification Visit.

- a. Confirm the candidate's name, correct setting, language, completed portfolio, family's name and address for the observation, and date and location for the review and reflection. Verify the candidate's information in *YourCouncil*.
- b. Confirm that the candidate has the correct *CDA[®] Competency Standards* book (purple color) and that the candidate has an original book, not a copy.
- c. Verify the candidate's information in *YourCouncil*. Confirm that the information provided by the candidate corresponds with the information in your *YourCouncil*. If you find any discrepancies, contact the ECE Observations team via email at pds@cdacouncil.org and wait to receive confirmation that the issue has been resolved prior to submitting the *Pre-Verification Visit Checklist* and completing the CDA Verification Visit[®]. Please do not try to resolve any concerns on your own.

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

HOME VISITOR CDA VERIFICATION VISIT[®]

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

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

- a. Arrive on time, introduce yourself to the candidate and check the candidate's ID.
- b. Obtain the candidate's Professional Portfolio and *Home Visitor CDA[®] Competency Standards* book.

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

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

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

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

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

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

Continued on next page

AFTER THE CDA VERIFICATION VISIT®

Once the CDA Verification Visit® has concluded, you can submit the candidate scores online in *YourCouncil*. The *Comprehensive Scoring Instrument (CSI)* is found in the *PDS Visit Request* tab on the left-hand side of the menu on your personal dashboard. You are required by the Council to submit the candidate's scores electronically in the *YourCouncil CSI* within 1 to 2 business days after the visit. Keep the original *CSI* scores, the *Pre-Verification Checklist*, the *Parent Permission Observation Form* and the *Home Visitor CDA® Assessor Recommendation Form* for one year.



Home Visitor Credential Overview

Before the CDA Verification Visit[®]

Home Visitor CDA PD Specialists[™] will follow the same procedures outlined in the *Before the CDA Verification Visit[®]* section of this manual ([pages 14-17](#)). Please visit the handy process guide above for the main steps.

Ready to Schedule

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

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

1. Verify that the candidate is in your *PDS Visit Request* tab in *YourCouncil* before you contact them. At this point, you are authorized to schedule the CDA Verification Visit[®].

2. As the selected PD Specialist, you may either initiate request to propose a verification date or reply to the candidate's request. After the verification visit has been scheduled, complete the *Pre-Verification Visit Checklist*.
3. When you contact the candidate to schedule the CDA Verification Visit[®], use the *Pre-Verification Visit Checklist* to:
 - a. Verify the candidate's setting (home visitor). Ask the candidate for the color of the CDA[®] *Competency Standards* book they used to prepare for the assessment. The *Home Visitor CDA[®] Competency Standards* book is purple.
 - b. Verify the candidate's home visit location, the name of the family and the name of the candidate's director.
 - c. Confirm the location(s) for the review of the candidate's portfolio, the family's home for the observation and the reflective dialogue. All three steps of the R.O.R. must be completed within 7 business days and can be completed at different locations. The review of the candidate's portfolio and the observation of the candidate conducting a home visit can be done in any order. However, the reflective dialogue must be completed as the last step of the R.O.R. Model[®]. For example, a candidate may schedule the observation with a family first and schedule the review and the reflective dialogue at another location.
 - d. Confirm that the candidate has a completed Home Visitor portfolio with all the required documentation (e.g., *First Aid and Infant/Child (pediatric) CPR*, formal education, family questionnaires, CDA[®] *Assessor Recommendation Form*, etc.) as well as a signed *Parent Observation Permission Form* for their observation. The Council has recommended that the candidate prepare a plan B, with another family from their caseload, in case an emergency requires them to replace the original family scheduled for the visit. Therefore, the candidate may secure a second *Parent Observation Permission Form*.
4. Contact the candidate's supervisor or director. Thank them for supporting the candidate's efforts to achieve the CDA[®] credential and answer any questions they may have. Confirm the date(s) and time(s) arranged with the candidate for the CDA Verification Visit[®]. Avoid any type of conversation related to the candidate's performance.

CDA Verification Visit®

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

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

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

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

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

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

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

Review Notes

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

Observe Notes

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

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

Home Visitor Resource Collection Items

A Home Visitor CDA® candidate must have evidence of the following items in their Resource Collection:

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

Please read the *Training Documentation Guidelines* on [page 86](#) and *Requirements for Candidate's Reflective Statements of Competence* on [page 89](#).

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

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

Observe for 1-3 hours in accordance with the home visitation program policies at the home of a family selected from the candidate's caseload.

The purpose of the observation is to document formal evidence of the CDA® candidate's competency in each of the 13 Functional Areas. On the day of the observation, you must:

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

If a candidate fails to arrive at the observation site within 15 minutes of the scheduled time, please contact the Council at 1-800-424-4310 and await additional guidance.

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

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

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

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

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

At the end of the reflective dialogue with the candidate, please tear out the *CSI* with your scoring information and return the candidate's *CDA® Competency Standards* book and Professional Portfolio. You will have 1 to 2 business days to enter the candidate's *CSI* scores in the *PDS Online Scoring Tool*.

Please do not share any scoring information with the candidate and advise the candidate that they will need to contact the Council for any information. You will need to hold onto the candidate's *Pre-Verification Visit Checklist* interview form, the *CSI*, the *Parent Observation Permission Form* and the *Home Visitor CDA® Assessor Recommendation Form* for one year. After one year, please shred all the above documents in order to maintain the candidate's privacy.

ENTERING CANDIDATE SCORES

Once the *CDA Verification Visit®* has concluded, you can submit the candidate scores online in *YourCouncil*. The *Comprehensive Scoring Instrument (CSI)* is found in the *PDS Visit Request* tab on the left-hand side of the menu on your personal dashboard. You will not have access to the *CSI* unless the *Pre-Verification Visit Checklist* is completed first. You are required by the Council to submit the candidate's scores electronically in the *YourCouncil CSI* within 1 to 2 business days after the visit. You will need the hard copy of the *CSI* that you removed from the back of the candidate's *CDA® Competency Standards* book. Your candidate's scores must be submitted electronically in *YourCouncil*.

You will need to click on the visit checklist link by the candidate's name to access the *CSI*. You will enter the candidate's scores, along with your comments, in the next three sections.



CDA PD Specialist™ Performance Evaluation

8.1 QUALITY ASSURANCE

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

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

- Monitoring CDA PD Specialist™ activities by analyzing Council data reports, compliance, systems, and processes, accompanying PD Specialists on visits, responding to field feedback to identify and resolve potential issues.
- Maintaining a focus on CDA PD Specialist™ feedback and challenges to remedy any concerns, investigating and responding to questions and inquiries, addressing identified violations through Council policy, providing technical assistance, retraining or consequential actions.

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

Quality improvement in the CDA PD Specialist™ system is necessary to enhance the Council's ability to meet the highest standards, exceed requirements and encourage continuous improvement. To reach these goals, the Council provides the following:

- Continuous trainings and updated training modules
- Updates to the PDS Resource Library
- Expansion of the use of experts in the field
- Opportunities to engage with our CDA PD Specialists™

8.2 INQUIRY AND INVESTIGATION

The Council may need to further examine the circumstances of a CDA Verification Visit®. The examination does not automatically imply there was any wrongdoing on the part of anyone associated with the visit. Often it is simply necessary to verify reporting. For this purpose, the **Council requires PD Specialists to retain CSI forms for a minimum of one year**. We reserve the right to request your CSI forms at any time as part of our quality assurance process.

Based on the severity of an infraction, the Council may require a CDA PD Specialist™ to discontinue all verification visits until the conclusion of the investigation. See [page 151](#) for detailed information.

ECE Observations staff take the following steps to research each situation:

Initiate an investigation:

- Information gathering - Contact all parties involved to gather details of the complaint and/or infraction. Outreach to all parties may include but is not limited to contacting the CDA PD Specialist™, CDA candidate, training programs and others.

Reporting

- Create a report detailing the complaint, infraction, or violation (if there is any), and make recommendations.

Decision:

- Consult with departmental management for decision. Share with PD Specialist and implement corrective action if needed.

All information remains confidential. The department does not share outcomes of the investigation with CDA candidates or other parties.

Please see a list of *Quality Assurance Guidelines* the Council adheres to on [page 151](#).

8.3 RETALIATION

If you come under investigation for an infraction by the Council, you cannot retaliate against the candidate, center (including its employees and affiliates), the Council or any other related parties. Retaliation includes but is not limited to punishing the candidate, or communicating in a manner that can be construed as threatening or intimidating.

This includes but is not limited to reporting a candidate's immigration status to the authorities, contacting the police or other governmental agencies, spreading false rumors, making a person's work more difficult, expressing negative emotions in writing, engaging in or threatening verbal or physical abuse, and using social media platforms and websites to spread negative feedback about any related parties. When you are on site, you are serving only in the capacity of a PD Specialist. You cannot operate in any other role, such as licensing specialist, inspector or teacher/trainer.

8.4 HARASSMENT

It is unlawful to harass and/or discriminate against a person. Federal and state laws prohibit discrimination and harassment based on personal attributes or protected classes:

- Age
- Disability
- Genetic information
- National origin
- Pregnancy
- Race/Color
- Religion
- Sex (includes sexual orientation)
- Military status

The PD Specialist must make every effort to comply with federal and state laws. The Council has zero tolerance for any PD Specialist who discriminates and/or harasses anyone associated with the CDA credentialing process.

8.5 CONTRACT TERMINATION

There can be a termination of the PD Specialist independent contractor, volunteer, or agency agreement when a PD Specialist violates any of the Council's policies and/or procedures. The Council reserves the right to terminate an agreement with a PD Specialist for:

- Taking bribes from candidates and/or charging them additional funds to complete their CDA Verification Visit®
- Entering scores under false pretenses and/or not completing the CDA Verification Visit® in accordance with Council policies and procedures
- Threatening, harming or harassing a CDA candidate and/or other parties involved in a verification visit
- Repeated instances of any serious or violations.

8.6 CONFLICT RESOLUTION FOR PDS

In the event a conflict arises between the candidate or center director and the PD Specialist, the following procedures apply:

Candidate/Center Director: Contacts the Council via Customer Support (800-424-4310) to file a complaint. Customer Support will then initiate a PDS Inquiry. A representative from the ECE Observations team will follow up with all parties to carry out an investigation, which will begin within 3-5 days from the receipt of the inquiry and continue until a decision is reached. The PDS will be notified of the Council's official decision via email and phone. None of the involved parties should have further contact with each other. All communication will go through the Council.

PDS: Conflicts may arise between the PD Specialist and a candidate, center director or another PDS. In this case, the PDS should contact the Council via pds@cdacouncil.org or through Customer Support (800-424-4310). Customer Support will then initiate a PDS Inquiry. A representative from the ECE Observations team will follow-up with all parties to carry out an investigation. The investigation will begin within 3-5 days from the receipt of the inquiry and will continue until a decision is reached. The PDS will be notified of the Council's official decision via email and phone. None of the involved parties should have further contact with each other. All communication will go through the Council.

To familiarize yourself with the level of infractions, refer to the *CDA PD Specialist Performance Evaluation* section or the *Quality Assurance Guideline* section found in this manual.

8.7 SECURITY PROTOCOL

Some child care centers are housed in highly secured facilities (i.e., military bases, federal office buildings, etc.), candidates and center directors should make special arrangements in advance to ensure the PDS will be allowed into all areas during the visit. For example, if the children play on a playground in a special area that requires a specifically issued ID, this will need to be arranged at least a day before the visit begins. The candidate should work with their center director to make sure the PDS will have everything they need. Confirm that everything is arranged ahead of time by asking the candidate and center director in the Pre-Visit Checklist if any special accommodations should be made in preparation for your visit.



Conclusion

This manual contains all the policies and procedures that govern the responsibilities of the CDA PD Specialist™. Always refer to it as your first resource for information. However, for occurrences not covered here, or for more clarity on a particular topic, please do not hesitate to contact the Council at 800-424-4310 or at pds@cdacouncil.org.

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

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

Helpful Documents

The following documents are provided as learning tools and ongoing references to guide you while supporting CDA® candidates and conducting CDA Verification Visits®. Official forms are in **bold**. The documents included are:

CDA PD Specialists™ Standards of Practice	74
CDA® Candidate Competency Standards At-A-Glance	75
Commonly Used Terms and Definitions	76
Summary of the CDA® Assessment System.....	80
CDA® Credential Settings	83
My CDA® Professional Portfolio.....	85
Training Documentation Guidelines	86
Summary of My CDA® Education	87
Family Questionnaires Summary Sheet.....	88
Requirements for Candidates' Reflective Statements of Competence.....	89
Checklist for the Observation	90
Agenda for the Reflective Dialogue with a CDA® Candidate	91
Facilitating a CDA Verification Visit® for Monolingual and Bilingual Candidates.....	93
Comprehensive Scoring Instrument.....	95
CDA Verification Visit® Reflective Dialogue Worksheet.....	117

Helpful Documents

For Home Visitor CDA PD Specialists™	119
• My CDA® Professional Portfolio	119
• Summary of My CDA® Education	120
• Agenda for the Reflective Dialogue with a Home Visitor CDA® Candidate	121
• Parent Observation Permission Form	123
• Home Visitor CDA® Assessor Recommendation Form	124
• Comprehensive Scoring Instrument	125
• CDA Verification Visit® Reflective Dialogue Worksheet	149

Quality Assurance Guidelines	151
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CDA Professional Development Specialist™ Independent Contractor Consulting Agreement	152
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CDA Professional Development Specialist™ Volunteer Agreement	157
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Important Information	161
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We strongly encourage you to frequently consult the Resource Library (www.cdacouncil.org/en/pds-community) to download all additional support resources not included in this manual.

Any questions or concerns? Please reach out to the ECE Observations team at pds@cdacouncil.org or at 202-265-9090.

CDA PD Specialists™ Standards of Practice

PERFORMANCE STANDARD 1:

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

PERFORMANCE STANDARD 2:

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

PERFORMANCE STANDARD 3:

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

PERFORMANCE STANDARD 4:

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

PERFORMANCE STANDARD 5:

Assessment Submission: The CDA PD Specialist™ submits individual candidate assessment data using the *YourCouncil*.

PERFORMANCE STANDARD 6:

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

CDA® Competency Standards At-A-Glance

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

Commonly Used Terms & Definitions

CDA® COMPETENCY STANDARDS BOOK

The *CDA® Competency Standards* books are available in each of the four CDA credential settings: Preschool, Infant and Toddler, Family Child Care and Home Visitor. All candidates are required to purchase their own copy of the *CDA Competency Standards* book and bring it to the CDA Verification Visit®. CDA PD Specialists™ will use the *Comprehensive Scoring Instrument* located at the end of the book to write notes and scores during the verification visit. The *CDA Competency Standards* books are available in the Council's online store.

CDA PD SPECIALIST™ ENDORSEMENT NUMBER

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

Note: *The CDA PD Specialist endorsement number is required for the candidate to complete and submit the CDA application.*

CDA VERIFICATION VISIT®

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

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

Commonly Used Terms & Definitions

COMPREHENSIVE SCORING INSTRUMENT (CSI)

The official scoring form used by the CDA PD Specialist™ to ascertain and record the recommended scores of the candidate in the 13 Functional Areas using the candidate's *Professional Portfolio* and a direct observation of them working with children. The scores from the candidate's CDA Verification Visit® are recorded on the *Comprehensive Scoring Instrument* located online in *YourCouncil*. The online form is used exclusively by CDA PD Specialists to view candidates who are ready to schedule, verify candidate setting types and submit scores from the verification visit to the Council.

CONFLICT OF INTEREST

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

1. You are the candidate's:
 - Relative (related by blood, marriage or other legal relationships)
 - Direct supervisor, teacher/trainer, director, center employee (including for example, a co-worker in the same group, classroom or center site) in the past three years.
2. The candidate is the employer.
3. You have a child in the candidate's class or group.
4. You have served as the candidate's CDA PD Specialist™:
 - For another CDA® credential.
 - In the past and the candidate is reapplying for the same credential.
5. You have a financial and/or contractual interest related to the candidate or may benefit in any way from the candidate's credentialing decision.
6. Any person who may have a personal or professional bias toward or against the candidate, or any group of which the candidate is a part (such as peer, friend or foe).
7. A licensing agent who has conducted a review, inspection or other service within the past two years for the child care facility.

FIND-A-PD SPECIALIST ONLINE DIRECTORY

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

To use the Find-A-PD Specialist Online Directory, candidates enter their work zip code, their classroom setting and the language in which they teach into the database.

Commonly Used Terms & Definitions

The database will generate the name and description of a PD Specialist based on the profile created in *YourCouncil*. The candidate then selects the nearest PD Specialist who meets the criteria for their credential type and sends a request to the specialist to conduct their verification visit.

YOURCOUNCIL

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

PRE-VERIFICATION VISIT CHECKLIST

A document used to assist CDA PD Specialists™ in properly preparing for the CDA Verification Visit®, including verifying the candidate's name, setting type, language and location.

PROFESSIONAL PORTFOLIO

The collection of documentation of the candidate's ability to meet all CDA® eligibility requirements—The portfolio also compiles the candidate's reflections on how their practice meets the CDA® Competency Standards. The portfolio consists of:

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

Commonly Used Terms & Definitions

R.O.R. MODEL®

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

READY TO SCHEDULE NOTICE

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

REFLECTIVE DIALOGUE

The conversation between the candidate and CDA PD Specialist™ that takes place at the conclusion of the CDA Verification Visit®—In it, the candidate reflects on their areas of strength and those in need of professional growth. The reflective dialogue is not scored and therefore has no bearing on the award of the CDA® credential.

Summary of the CDA® Assessment System

OVERVIEW

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

PREPARATION

- 1. PREPARE:** In preparation for earning their CDA® credential, every CDA candidate must ensure that they meet specific requirements and complete the necessary prerequisites set out in all *CDA Competency Standards* books:
 - A high school diploma, GED, or enrollment in a high school career and technical program.
 - 120 hours of formal early childhood education training, covering the growth and development of children aged birth to 5 years, with no fewer than 10 training hours in each of the eight CDA® Subject Areas. While formal education hours can be for credit or noncredit, they must be earned through an agency or organization with expertise in early childhood teacher preparation. The agency or organization must verify the candidate's education in the form of an official transcript, certificate or letter.
 - 480 hours of work experience, that is appropriate for the age-level credential type and accumulated in the previous 3 years.
 - *Family Questionnaire* collection from the families of the children in care
 - *Professional Portfolio* adhering to the guidelines in the appropriate age-level and credential setting of the *CDA Competency Standards* book.
 - Permission from their program administrator/director to conduct their individual CDA Verification Visit® on site while working with young children as a lead teacher or directly with families with young children for home visitor candidates.
 - Agreement from a Council endorsed, CDA Professional Development Specialist™ to conduct the on-site CDA Verification Visit using the R.O.R. Model®.

Summary of the CDA® Assessment System

APPLICATION

Each candidate handles purchasing a personal copy of a credential-specific *CDA® Competency Standards* book. The book includes everything the candidate need to prepare and apply for the CDA® credential. The *CDA Competency Standards* book contains complete information on the credentialing process. The CDA Competency Standards and all the forms the candidate uses, including application, *Family Questionnaire* and the official *Comprehensive Scoring Instrument* utilized by the CDA Professional Development Specialist™. The candidate is responsible for bringing this to the CDA Verification Visit®.

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

- Completes the CDA application (recommended to be done online)
 - Confirms eligibility
 - Confirms prerequisites completed
 - Select English or Spanish as preferred language for the CDA exam
 - Locates a Council-endorsed CDA PD Specialist™ and acquires their agreement to serve as their CDA PD Specialist
 - Provides ID number of CDA PD Specialist
 - Acquires permission from their program administrator/director to conduct their individual CDA Verification Visit on site while working with young children as a lead teacher
 - Obtains program director's signature
 - Assessment fee payment
 - Application reviewed and approved
 - Waits to receive the *Ready to Schedule (R2S)* notice from the Council before scheduling the CDA Verification Visit® and exam.

Summary of the CDA[®] Assessment System

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

- Receives the *Ready to Schedule* notice.
- Schedules the date and time of CDA Verification Visit[®] in agreement with the CDA PD Specialist.
- Schedules appointment to take the CDA[®] exam at a Pearson VUE testing center.

DEMONSTRATION

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

- CDA Verification Visit with a CDA PD Specialist
- Review of documents prepared in step 1 above
- Observation of candidate in a classroom or home setting
- Reflective dialogue
- CDA exam at a Pearson VUE Test Center
- Both completed in any sequence but before the candidate's six-month deadline

EARN

4. EARN

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

CDA Credential Settings

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

CENTER BASED SETTING

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

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

FAMILY CHILD CARE SETTING

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

HOME VISITOR SETTING

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

BILINGUAL SETTING

(Required for candidates who apply for Bilingual Specialization)

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

SPECIAL EDUCATION SETTING

A “**Special Education**” child development setting—one that serves children with moderate to severe special needs—does qualify as an eligible setting for a CDA® assessment.

CDA Credential Settings

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

NOTE: Drop-in programs and before-and-after school programs are not eligible settings where a candidate can prove their competence around the CDA Competency Standards, including all Functional Areas.

INFANT-TODDLER ENDORSEMENT SUB-GROUPS

To demonstrate competence with the complete Infant-Toddler age range, a candidate applying for a CDA credential with Infant-Toddler endorsement must:

- Be observed by the CDA Professional Development Specialist™ while working in their classroom with any or all the three Infant-Toddler sub-groups.

Young Infants
(Birth - 8 months)

Mobile Infants
(9 - 17 months)

Toddlers
(18 - 36 months)

- Complete Professional Portfolio according to Infant-Toddler requirements (see pages 13-20 in the *CDA® Competency Standards* book), including those specific resources embedded in the Resource Collection and Reflective Statements of Competence that will allow the candidate to demonstrate their competence with all subgroups.

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

1. The CDA PD Specialist must have the training and experience specifically focused on the candidate's particular credential.
2. The candidate's *Professional Portfolio* must address all developmental age groups in the *Reflective Statements of Competence* and *Resource Collection* of specific items.
3. If the candidate is applying for a bilingual credential:
 - a. The candidate's program **MUST** use both languages in its daily operations with children and families.
 - b. The candidate must be fluent in both languages.
 - c. The CDA PD Specialist must be proficient in both languages (able to speak, read and write English and other language) and understand and be understood by both children and adults.
 - d. The candidate's *Professional Portfolio* must be compiled to represent the bilingual requirements in the candidate's *CDA® Competency Standards* book.



Indicates a required example for candidates seeking bilingual specialization.



MY CDA® Professional Portfolio

Candidate Name

Candidate ID Number

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

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

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

Candidate Signature

Date

Training Documentation Guidelines

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

Acceptable forms of training documentation are:

- College transcript from an accredited college or university
- Certificate of Training
- Letter of training on official letterhead of the agency(ies)
- ***Pending Council approval, transcripts from a state registry system may be accepted. An approved list of states is in the PDS Resource Library.***

The training documents should meet the following guidelines:

- Training agency name and address
- Training agency logo
- Course name(s) *Note: If course name does not include age reference, certificate must include the ages the training covered.*
- CDA subject area of training
- Candidate's name
- Number of hours/credits awarded
- Dates of training
- Official signature of instructor
- Training must be completed before the CDA Verification Visit®.
- **Training offered at conferences or from individual consultants is not acceptable.**
- Training documentation should not appear altered in any way, such as vital information that is crossed over with correction fluid and one agency verifying another agency.

Training logs are not acceptable as training documentation. Training logs are not official documents since they do not meet the criteria stated above.

1 quarter hour = 10 clock hours

1 semester hour = 15 clock hours

1 CEU = 10 clock hours

Please Note: If you determine that any of the documentation does not meet these criteria, you must document what appears incorrect or missing. This should be indicated in the last blue section of the *Comprehensive Scoring Instrument (CSI)*. After the CDA Verification Visit, submit this information to the Council, along with your scores.



Summary of My CDA® Education

Candidate Name

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

Statements of CDA® Education Completion:

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

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

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

Candidate Signature

Date



Family Questionnaires Summary Sheet

Candidate Name

Candidate ID Number

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

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

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

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

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

Note to the CDA PD Specialist™:

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

Requirements for Candidate's Reflective Statements of Competence

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

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

Checklist for the Observation

Your purpose in observing the CDA® candidate is to document formal evidence of their competency in each of the 13 Functional Areas.

- Familiarize yourself with the *13 Functional Areas* and *Numbered Items*.
 - The *Numbered Items* are specific goals you must keep in mind while observing the candidate in order to collect valid information to record on the Comprehensive Scoring Instrument (CSI).
- Gather as much information as possible during the two-hour observation before making your final rating decisions.
 - The candidate **MUST** perform as the **lead teacher** during this two-hour observation regardless of whether they regularly work as the lead teacher.
- Use the CSI tool during the observation session. It is organized into three distinct color-coded sections:
 - Settings and Activities (**ORANGE**)
 - Actions and Interactions (**GREEN**)
 - Review (**BLUE**)
- Wear comfortable, professional clothing, bring spare writing instruments, limit the number of personal items you have with you and use the restroom before you begin.
- Find a comfortable spot in the room to begin your observation, out of the way of activities, from which you can easily see and hear the candidate in action.
 - Your two-hour focus on the candidate should never be interrupted. **Do not use your personal devices during this time.**
 - As an observer, you are encouraged to remain silent and to be “invisible.” Refrain from interacting with the children or the candidate. If a child asks you what you are doing, you might say “my job is to watch teachers and children play.”
 - If the candidate and children move to another room or outdoors, always follow them quietly.
- Your tendency may be to focus on a particular event that is occurring. However, remember that you are gathering a considerable amount of evidence in a limited period. Hold yourself to a steady pace to keep from “getting lost” in wonderful early childhood moments.
- Do not let the CSI lead your process. Let unfolding events guide your use of the instrument. In other words, do not just use the CSI as a “checklist,” only watching for Items in the order they are presented in the Instrument. Instead, feel free to move back and forth between Indicators, Items, and even functional areas, as you find instances of the candidate’s competencies occurring around you, from moment to moment.
- Record all notes on the candidate’s CSI tool and protect this confidential information.
- Remove the CSI form from the candidate’s book and take it with you. You will need it to record the scores online in the Scoring Tool.

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

Agenda for the Reflective Dialogue with a CDA[®] Candidate

WELCOME & CLARIFICATIONS (APPROX. 15 MIN.)

Welcome (Approx. 5 mins)

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

Clarifications (optional) (Approx. 10 min.)

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

REFLECTIVE DIALOGUE, PROFESSIONAL PHILOSOPHY STATEMENT (10 MIN.)

Reflective Dialogue Introduction

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

You will ask the candidate to look at the *Reflective Dialogue Worksheet*. During the Reflective Dialogue, the candidate uses the worksheet to record important points about areas of professional strength and areas for future professional growth. The candidate refers to the worksheet at the end of the dialogue, as they set goals and record possible steps to reach each objective.

Professional Philosophy Statement Review

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

CANDIDATE SELF-REFLECTION (APPROX. 15 MIN.)

Areas of Professional Strength

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

In column 2 box C of the *Reflective Dialogue Worksheet*, the candidate records what they identify as areas of professional strength.

Areas for Future Professional Growth

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

Agenda for the Reflective Dialogue with a CDA[®] Candidate

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

In column 2 box D of the *Reflective Dialogue Worksheet*, the candidate records what they identify as areas for future professional growth.

CDA PD SPECIALIST™ FEEDBACK (APPROX. 15 MIN.)

One Area of Professional Strength

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

One Area for Future Professional Growth

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

GOAL-SETTING & ACTION-PLANNING, CLOSE (APPROX. 15 MIN.)

Goal-Setting

- **CDA PD Specialist:** “Use the areas of strength and future growth that you’ve identified and written down on your *Reflective Dialogue Worksheet*. Let’s take some reflective time to identify 1 to 3 professional development goals you might set for yourself to record on the back of this worksheet.” (*Note: The candidate, not the CDA PD Specialist™, determines the final goals.*)

Action-Planning

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

Close

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

Facilitating a CDA Verification Visit® for Monolingual and Bilingual Candidates

Facilitating a CDA Verification Visit® for a Monolingual Candidate

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

DEMONSTRATE

The CDA Verification Visit®

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

The CDA® Exam

All Candidates must complete the CDA Exam. Candidates applying in English, Spanish, or bilingual English/Spanish have the option of selecting to take the exam in English or Spanish

Candidates applying for a monolingual assessment in another language other than English or Spanish will complete a paper exam in the language of the assessment

Candidate applying for a bilingual credential in English and another language other than Spanish are required to complete the exam in English at a Pearson VUE test site.

Note: If the language of the specialization is one other than Spanish, the candidate must contact the Council to discuss special circumstances before submitting their application.

Facilitating a CDA Verification Visit® for a Bilingual Candidate

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

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

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

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

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

Facilitating a CDA Verification Visit® for Monolingual and Bilingual Candidates

EDUCATION REQUIREMENTS

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

THE PROFESSIONAL PORTFOLIO

In addition to meeting all the standard requirements for a Professional Portfolio, Bilingual Language Specialization also requires:

Family Questionnaires

When inviting families to complete the Family Questionnaires, families should be asked to complete all questions, paying particular attention to Question #14, which is specific to bilingual programs.

The Resource Collection

The resources used directly with children and families must be presented in both languages (RC I-3, RC II, RC III, RC IV).

Reflective Statements of Competence

Three statements in English and three in the other language are required for the six Statements of Competence. Candidates are free to decide which statements to write in English and which ones in the other language. These statements must include information about how the candidate applies Principles of Dual Language Learning to their bilingual daily practice with children.

Professional Philosophy Statement

The candidate may write the Professional Philosophy Statement in either language.

APPLY

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

DEMONSTRATE

The CDA Verification Visit®

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

The Observation

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

The CDA® Exam

Candidates applying for a bilingual English/Spanish credential have the option of selecting to take the exam in English or Spanish.

Candidate applying for a bilingual credential in English and another language other than Spanish are required to complete the exam in English at a Pearson VUE test site.



Comprehensive Scoring Instrument

Candidate's Name: _____

Credential Type: Infant/Toddler Preschool Family Child Care

Bilingual Specialization: Yes No

Date of Portfolio Review: _____

Date of Observation: _____

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

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

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

Structure of the CSI

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

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

Functional Area

Item/Item/Item

Indicator

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

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

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

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

Use of the CSI

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

1	2	3
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1 = Little or no evidence

2 = Some evidence

3 = Great deal of evidence

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

Sections of the CSI

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

Settings & Activities

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

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

Actions & Interactions

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

Review

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

Final Steps

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

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

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

Functional Area 1: **SAFE**

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

1	2	3
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Indicator:

- a) _____ Materials, equipment and environments are safe

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

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

Indicators:

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

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

<p>Review Notes</p>	<p>Observation Notes</p>
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Functional Area 2: **HEALTHY**

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

1	2	3
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Indicators:

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

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

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

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

1	2	3
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Indicators:

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

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

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

Indicators:

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

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

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

Indicators:

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

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

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

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

1	2	3
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Indicator:

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

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

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

Indicator:

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

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

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

Indicator:

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

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

Review Notes	Observation Notes
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Functional Area 5: **COGNITIVE**

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

1	2	3
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Indicator:

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

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

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

Indicators:

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

Optional Notes: COGNITIVE (Items 5.1, 5.2 above)

Review Notes	Observation Notes

Functional Area 6: **COMMUNICATION**

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

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

Indicators:

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

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

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

Indicators:

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

Optional Notes: COMMUNICATION (Items 6.1, 6.2 above)

Review Notes	Observation Notes

Functional Area 7: CREATIVE

Item 7.1 Activities and materials encourage children to express themselves through the visual arts. (p. 73)

1	2	3
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Indicators:

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

Item 7.2 Activities and materials encourage children to dance, move and develop their musical abilities. (p. 74)

1	2	3
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Indicators:

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

Item 7.3 Activities and materials provided encourage children to develop their imaginations. (p. 74)

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

Indicators:

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

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

Review Notes	Observation Notes

Functional Area 8: SELF

Item 8.1 Children’s environments support the development of positive self-concepts. (p. 78)

1	2	3
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Indicators:

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

Optional Notes: SELF (Item 8.1 above)

Review Notes	Observation Notes
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Functional Area 9: SOCIAL

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

1	2	3
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Indicator:

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

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

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

Indicator:

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

Optional Notes: SOCIAL (Items 9.1, 9.2 above)

Review Notes	Observation Notes
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Settings & Activities

Functional Area 10: GUIDANCE

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

1	2	3
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Indicator:

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

Optional Notes: GUIDANCE (Item 10.1 above)

Review Notes	Observation Notes
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Functional Area 11: FAMILIES

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

1	2	3
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Indicators:

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

Optional Notes: FAMILIES (Item 11.1 above)

Review Notes	Observation Notes
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Functional Area 1: SAFE

Item 1.3 Candidate ensures children's safety at all times. (p. 43)

1	2	3
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Indicators:

- a) _____ Ensures that children are attended by authorized adults at all times
- b) _____ Teaches children appropriate safety practices
- c) _____ Provides attentive supervision at all times
- d) _____ Makes sure that foods that are known choking hazards are not served

Optional Notes: SAFE (Item 1.3 above)

Review Notes	Observation Notes

Actions & Interactions

Functional Area 2: HEALTHY

Item 2.2 Candidate implements appropriate hygiene practices to minimize the spread of infectious diseases. (p. 46)

1	2	3
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Indicators:

- a) _____ Cleans/sanitizes materials and equipment
- b) _____ Uses correct hand washing procedures before and after serving food, diapering/toileting and whenever needed
- c) _____ Implements sanitary diapering/toileting procedures

Item 2.3 Candidate encourages children to practice healthy habits. (p. 47)

1	2	3
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Indicators:

- a) _____ Ensures that older children wash hands properly, with assistance when needed
- b) _____ Models, communicates and provides activities that teach the importance of good health to children and families

Item 2.4 Candidate provides appropriate mealtime experiences. (p. 49)

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

Indicators:

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

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

Review Notes	Observation Notes

Actions & Interactions

Functional Area 3: LEARNING ENVIRONMENT

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

1	2	3
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Indicator:

- a) _____ Creates a nurturing relationship with each child

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

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

Indicators:

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

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

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

Indicator:

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

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

Review Notes	Observation Notes

Functional Area 4: PHYSICAL

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

1	2	3
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Indicators:

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

Optional Notes: PHYSICAL (Item 4.4 above)

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

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

1	2	3
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Indicators:

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

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

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

Indicators:

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

Optional Notes: COGNITIVE (Items 5.3, 5.4 above)

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

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

1	2	3
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Indicators:

- a) _____ Reads to children engagingly

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

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

Indicators:

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

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

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

Indicators:

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

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

Review Notes	Observation Notes

Functional Area 7: CREATIVE

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

1	2	3
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Indicators:

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

Optional Notes: CREATIVE (Item 7.4 above)

Review Notes	Observation Notes
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Functional Area 8: SELF

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

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

Indicators:

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

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

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

Indicators:

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

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

Review Notes	Observation Notes
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Functional Area 9: SOCIAL

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

1	2	3
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Indicators:

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

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

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

Indicators:

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

Optional Notes: SOCIAL (Items 9.3, 9.4 above)

Review Notes	Observation Notes

Actions & Interactions

Functional Area 10: GUIDANCE

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

Optional Notes: GUIDANCE (Items 10.2, 10.3 above)

Review Notes	Observation Notes

Note to the CDA Professional Development (PD) Specialist™:

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

Functional Area 11: FAMILIES

Item 11.2 Candidate appreciates the uniqueness of each family.

(p. 95)

1	2	3
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Indicators:

- a) _____ Welcomes and respects every family

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

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

Indicators:

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

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

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

Indicators:

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

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

Review Notes	Observation Notes

Functional Area 12: PROGRAM MANAGEMENT

Review

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

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

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

Indicator:

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

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

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

Review Notes	Observation Notes
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Functional Area 13: PROFESSIONALISM

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

1	2	3
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Indicators:

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

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

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

Indicators:

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

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

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

Indicator:

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

(Continued on next page)

Note to the CDA Professional Development (PD) Specialist™:

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

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

1		3
---	--	---

3 = All Portfolio requirements met

1 = One or more Portfolio requirements were not met

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

Indicators:

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

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

Review Notes	Observation Notes

Required Portfolio Components

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

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

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

Yes No

If "No," please explain: _____

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

Yes No

If "No," please explain: _____

For the CDA PD Specialist™:

Reminders to Myself to Prepare for the Reflective Dialogue

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

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

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

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

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

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

One Area of Strength

One Area for Professional Growth

CDA Verification Visit® Reflective Dialogue Worksheet



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

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

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

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

Step 2: Set Goals, Plan Action Steps

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

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

Step 3: Commit to Achieving Your Goal(s)

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

CDA Candidate (sign here)

as witnessed by my CDA PD Specialist (sign here)

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



MY CDA® Professional Portfolio

Candidate Name

Candidate ID Number

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

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

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

Candidate Signature

Date

127



Summary of My CDA® Education

Candidate Name

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

Statements of CDA® Education Completion:

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

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

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

Candidate Signature

Date

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

WELCOME & CLARIFICATIONS (UP TO 10 MIN.)

Welcome

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

Clarifications (optional)

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

REFLECTIVE DIALOGUE, PROFESSIONAL PHILOSOPHY STATEMENT (10 MIN.)

Reflective Dialogue Introduction

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

The Home Visitor CDA PD Specialist™ asks the candidate to turn to the *Reflective Dialogue Worksheet* found on [page 149](#) in this book. During the Reflective Dialogue, they will use the worksheet to record important points to remember about the candidate’s Areas of Professional Strength and Areas for Future Professional Growth. The candidate will then refer to their worksheet, at the end of the Dialogue, as they set goals and record possible steps to reach each goal.

Professional Philosophy Statement Review

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

CANDIDATE SELF-REFLECTION (20 MIN.)

Areas of Professional Strength

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

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

Areas for Future Professional Growth

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

CDA PD SPECIALIST™ FEEDBACK (LESS THAN 10 MIN.)

One Area of Professional Strength

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

One Area for Future Professional Growth

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

GOAL-SETTING & ACTION-PLANNING, CLOSE (10 MIN.)

Goal-Setting

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

Action-Planning

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

Close

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



Home Visitor CDA®

Parent Observation Permission Form

I understand that _____

(Home Visitor CDA Candidate's Name)

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

Name of CDA PD Specialist (observer): _____

Signature of Parent or Guardian

Date



Visitador de hogares CDA®

Formulario de autorización de los padres para la observación

Entiendo que _____

(Nombre del candidato CDA)

desea obtener una credencial CDA® para lo cual debe ser observado durante la realización de una visita a un hogar. Concedo autorización para que el Especialista CDA en desarrollo profesional observe a este candidato durante su visita a mi familia. Entiendo que esta persona observará únicamente al candidato y no evaluará a mi familia ni a mi hogar. Espero que el especialista se conduzca de manera profesional y que comparta la información recopilada de estas observaciones única y exclusivamente con representantes autorizados del Concilio para el Reconocimiento Profesional.

Nombre del Especialista CDA en desarrollo profesional (Observador): _____

Firma del padre/madre o tutor

Fecha



Home Visitor CDA® Assessor Recommendation Form

To be completed by the Home Visitor candidate’s Assessor (Mentor/Coach/Instructor) working in the candidate’s Home Visitor Program or in the candidate’s training agency.

Home Visitor Candidate’s Name: _____

Last four digits of the candidate’s Identification Number: _____

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

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

Select Circle One:

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

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

Signature: _____ Date: _____

Your Agency or Organization: _____

Your position: _____ Telephone number: _____

Address: _____

City: _____ State: _____ Zip Code: _____

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

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



Comprehensive Scoring Instrument

Candidate's Name: _____

Credential Type: Home Visitor

Bilingual Specialization: Yes No

Date of Portfolio Review: _____

Date of Observation: _____

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

Instructions for the CDA Professional Development (PD) Specialist:

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

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

Structure of the CSI

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

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

Functional Area

Item/Item/Item

a) Indicator

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

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

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

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

Use of the CSI

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

1 = Little or no evidence

2 = Some evidence

3 = Great deal of evidence

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

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

Sections of the CSI

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

Settings & Activities

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

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

Actions & Interactions

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

Review

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

Final Steps

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

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

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

Safe/Healthy

Functional Area 1: SAFE

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

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

Indicator:

- a) _____ Materials, equipment and environments are safe

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

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

Indicators:

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

Optional Notes: SAFE (Items 1.1, 1.2 above)

<p>Review Notes</p>	<p>Observation Notes</p>
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Functional Area 2: HEALTHY

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

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

Indicators:

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

Optional Notes: HEALTHY (Item 2.1 above)

<p>Review Notes</p>	<p>Observation Notes</p>
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Settings & Activities

Functional Area 3: **LEARNING ENVIRONMENT**

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

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

Indicators:

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

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

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

Indicators:

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

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

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

Indicators:

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

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

<p>Review Notes</p> 	<p>Observation Notes</p>
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Settings & Activities

Physical/Cognitive

Functional Area 4: PHYSICAL

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

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

Indicator:

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

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

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

Indicator:

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

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

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

Indicator:

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

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

Review Notes	Observation Notes
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Functional Area 5: COGNITIVE

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

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

Indicator:

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

Item 5.2 There is evidence that materials and equipment at the home stimulate children’s thinking and problem solving.

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

(p. 65)

Indicators:

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

Optional Notes: COGNITIVE (Items 5.1, 5.2 above)

Review Notes	Observation Notes
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Functional Area 6: COMMUNICATION

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

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

Indicators:

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

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

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

Indicators:

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

Communication/Creative

Optional Notes: COMMUNICATION (Items 6.1, 6.2 above)

Review Notes	Observation Notes
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Functional Area 7: CREATIVE

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

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

Indicator:

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

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

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

Indicator:

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

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

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

Indicator:

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

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

Review Notes	Observation Notes
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Settings & Activities

Functional Area 8: SELF

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

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

Indicators:

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

Optional Notes: SELF (Item 8.1 above)

Review Notes	Observation Notes

Functional Area 9: SOCIAL

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

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

Indicator:

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

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

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

Indicator:

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

Optional Notes: SOCIAL (Items 9.1, 9.2 above)

Review Notes	Observation Notes

Settings & Activities

Functional Area 10: GUIDANCE

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

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

Indicator:

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

Optional Notes: GUIDANCE (Item 10.1 above)

<p>Review Notes</p>	<p>Observation Notes</p>
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Functional Area 11: FAMILIES

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

1	2	3
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Indicators:

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

Optional Notes: FAMILIES (Item 11.1 above)

<p>Review Notes</p>	<p>Observation Notes</p>
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Functional Area 1: SAFE

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

1	2	3
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Indicators:

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

Optional Notes: SAFE (Item 1.3 above)

Review Notes	Observation Notes

Actions & Interactions

Functional Area 2: HEALTHY

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

1	2	3
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Indicators:

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

Healthy/Learning Environment

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

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

Review Notes	Observation Notes
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Actions & Interactions

Functional Area 3: LEARNING ENVIRONMENT

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicator:

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

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

<p>Review Notes</p>	<p>Observation Notes</p>
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Actions & Interactions

Functional Area 4: PHYSICAL

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

1	2	3
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Indicators:

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

Physical/Cognitive

Optional Notes: PHYSICAL (Item 4.4 above)

Review Notes	Observation Notes
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Functional Area 5: COGNITIVE

Actions & Interactions

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

1	2	3
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Indicator:

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

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

1	2	3
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Indicators:

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

Optional Notes: COGNITIVE (Items 5.3, 5.4 above)

Review Notes	Observation Notes
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Functional Area 6: COMMUNICATION

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

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

Actions & Interactions

Review Notes	Observation Notes
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Functional Area 7: CREATIVE

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

1	2	3
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Indicators:

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

Optional Notes: CREATIVE (Item 7.4 above)

Review Notes	Observation Notes
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Actions & Interactions

Functional Area 8: SELF

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

Optional Notes: SELF (Items 8.2 and 8.3 above)

Review Notes	Observation Notes
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Functional Area 9: SOCIAL

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

Actions & Interactions

Optional Notes: SOCIAL (Items 9.3, 9.4 above)

Review Notes	Observation Notes
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Guidance

Functional Area 10: GUIDANCE**Item 10.2 Helps parents to learn and use positive guidance techniques. (p. 86)**

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

Optional Notes: GUIDANCE (Items 10.2, 10.3 above)

Review Notes	Observation Notes
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Note to the CDA Professional Development Specialist:

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

Functional Area 11: FAMILIES

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

1	2	3
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Indicator:

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

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

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

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

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicator:

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

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

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

Review Notes	Observation Notes
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Functional Area 13: PROFESSIONALISM

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

1	2	3
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Indicators:

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

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

1	2	3
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Indicator:

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

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

1	2	3
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Indicators:

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

(Continued on next page)

Note to the CDA Professional Development Specialist:

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

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

1		3
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3 = All Portfolio requirements met

1 = One or more Portfolio requirements were not met

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

Indicators:

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

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

<p>Review Notes</p>	<p>Observation Notes</p>
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Required Portfolio Components

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

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

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

Yes No

If "No," please explain: _____

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

Yes No

If "No," please explain: _____

For the Home Visitor CDA PD Specialist:

Reminders to Myself to Prepare for the Reflective Dialogue

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

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

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

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

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

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

One Area of Strength

One Area for Professional Growth



CDA Verification Visit® Reflective Dialogue Worksheet

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

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

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

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

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

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

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

Step 3: Commit to Achieving Your Goal(s)

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

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

CDA Candidate (sign here)

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



Quality Assurance Guidelines

QUALITY ASSURANCE INQUIRIES	EXAMPLES (NOT LIMITED TO)	CONSIDERATION	COUNCIL ACTION
<p>MINOR - Violations of Council policies and procedures that, in the opinion of the Council, have little or no adverse impact on the quality of CDA Verification Visit®, validity of the assessment or the integrity of the Credential.</p>	<ul style="list-style-type: none"> • Conducting the CDA Verification Visit® without completing the <i>Pre-Verification Visit Checklist</i>. • Not responding to candidate's in a timely manner. • Taking the <i>Professional Portfolio</i> home to review. 	<p>Based upon the inquiry, staff follow-up to update and reinforce training due to self-directed minor inappropriate behavior or performance.</p>	<p>No disciplinary action Corrective discussion</p>
<p>SERIOUS - Violations of Council policy and procedures that, in the opinion of the Council, may have adverse impact on the quality of the CDA Verification Visit®, validity of the assessment or the integrity of the Credential.</p>	<ul style="list-style-type: none"> • Conducting the CDA Verification Visit® in a language you are not proficient in OR has not been approved by the Council's ECE Observations Team. • Continued repetition of minor quality assurance inquiries. 	<p>Depending on the inquiry, the Council may either restrict PDS continued participation in candidate CDA Verification Visits® or suspend the PDS for a period of time to seek additional training and reflection due to systematically or socially inappropriate behavior or actions directed toward others.</p>	<p>Temporary monitoring action will be imposed depending on the uniqueness of the inquiry Corrective discussion</p>
<p>MAJOR - Violations of Council policy and procedures that, in the opinion of the Council, have significant adverse impact on the quality of the CDA Verification Visit®, validity of the assessment or the integrity of the Credential.</p>	<ul style="list-style-type: none"> • Taking bribes and/ or charging additional funds, from candidates to complete their CDA Verification Visit®. • Entering scores under false pretenses and/ or not completing the CDA Verification Visit® in accordance with Council policies and procedures. • Continued repetition of minor quality assurance inquiries. 	<p>A major inquiry may result in suspension from participation in candidate CDA Verification Visits® or depending on the severity/repetitiveness of the infractions(s), such as unethical behavior or criminal conduct, it may result in expulsion without the opportunity for future participation. The Council reserves the right to suspend or expel a PDS prior to administrative review for major infractions.</p>	<p>May include: removal from PDS Portal; deactivation; permanent removal from system</p>

CDA Professional Development Specialist™ Independent Contractor Consulting Agreement

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

I. SCOPE OF WORK

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

1. Review of all written and online materials provided by the Council and participation in all required PD Specialist professional development instruction and assessment sessions (current and future), which provide detailed information on the role of the PD Specialist.
2. Conducting the CDA Verification Visit® process in accordance with the policies and procedures established by the Council. The CDA Verification Visit® process includes:
 - Connecting to the PD Specialist portal a minimum of once per week to retrieve emails related to your work as a PD Specialist.
 - Promptly responding to and communicating with CDA candidates regarding your availability to accept and schedule verification visits.
 - Conducting each mutually (CDA candidate and PD Specialist) agreed-upon and scheduled CDA Verification Visit.
 - Allowing a minimum of four (4) hours to complete each scheduled visit.
 - Scheduling and conducting no more than two (2) CDA Verification Visits per day.
 - Submitting to the Council all required CDA candidate assessment scores (using approved Council forms, documents and online platforms) within 1 to 2 business days after completing the candidate CDA Verification Visit® or before the candidate’s six- (6) month expiration deadline (whichever comes first), in accordance with Council policies and procedures.

- Maintaining original Comprehensive Scoring Instrument (CSI) scores and Pre-Verification Visit checklist for one year (12 months) for each candidate CDA Verification Visit conducted.
3. Maintaining the integrity of the candidate CDA Verification Visit® process and quality of the candidate’s experience by conducting visits using the approved R.O.R. Model®, which consists of the following steps:
 - **Reviewing** the contents of the candidate’s Professional Portfolio, training transcripts/certificates and Family Questionnaires.
 - **Observing** the candidate working with children, in the setting of their desired CDA credential, and recording criteria evidence where applicable.
 - **Reflecting** with the candidate, focusing on their areas of strength or growth found in the portfolio or seen during the observation.
 4. Administering, under special preapproved circumstances, the paper exam process for CDA candidates in accordance with the policies and procedures established by the Council.

II. INDEPENDENT CONTRACTOR SERVICES

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

1. I am not permitted to charge CDA candidates or related programs any additional fees or request reimbursement for expenses when conducting a CDA Verification Visit® with a CDA candidate. Should I violate this policy, I understand that my services as a CDA Professional Development Specialist™ under this agreement will be terminated immediately and I will not be permitted to reapply.
2. I will notify the Council and explain in detail if I have conflicts of interest that may make it inappropriate to serve as a CDA Professional Development Specialist™ for a CDA candidate.
3. All CDA candidate information, CDA Verification Visit® data, CDA Verification Visit® results, the online platform, *YourCouncil*, PD Specialist Portal, online passwords and other data that I may handle while serving as a CDA Professional Development Specialist™ are confidential, and may not be copied, revealed or shared with any unauthorized party.
4. I will protect the privacy rights of CDA candidates and the Council in all information disclosed to me about the candidates acquired before, during and after the CDA assessment process. All confidential information will be maintained in strict confidence.
5. I will promptly notify the Council when I am no longer available to serve as a PD Specialist and understand that once my departure from the PD Specialist Program is effective, my access to *YourCouncil* and my name and contact information in the PD Specialist Directory will be removed.

6. I will handle the CDA assessment and testing instruments in an ethical manner and agree to protect the confidentiality of the candidate's Comprehensive Scoring Instrument (CSI) and the CDA Verification Visit and exam scores submitted.
7. I understand that Council staff will be enacting a quality assurance process to randomly monitor the services outlined in this agreement. I agree to fully participate in the Council's quality assurance process and cooperate with Council staff tasked with that responsibility.
8. I also understand that the Council will treat my personal information as confidential and will use it for internal administrative purposes only and will not share it with third parties except on a "need to know" basis in furtherance of the Council's business. For either party, confidential information may be provided to a third party if it is pursuant to a valid order of a court or other government body.
9. I understand that I am not an employee of the Council. None of my social media, email or telephone greetings will suggest that I am an employee. All my correspondence as a CDA PD Specialist will indicate that I am an independent contractor of the Council for Professional Recognition.

III. COMPENSATION

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

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

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

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

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

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

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

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

IV. OTHER TERMS AND CONDITIONS

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

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

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

CDA Professional Development Specialist™ Volunteer Agreement

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

I. SCOPE OF WORK

Volunteer understands and agrees to provide the following services in their role as a PD Specialist supporting the assessment of candidates seeking their Child Development Associate® (CDA) credential:

1. Review of all written and online materials provided by the Council and participation in all required PD Specialist professional development instruction and assessment sessions (current and future) which provide detailed information on the PD Specialist role.
2. Conducting the CDA® candidate CDA Verification Visit® evaluation process in accordance with the policies and procedures established by the Council. The CDA Verification Visit® process includes:
 - Connecting to the PD Specialist portal a minimum of once per week to retrieve emails related to your role as a PD Specialist.
 - Promptly responding to and communicating with CDA candidates regarding your availability to accept and schedule CDA Verification Visits.
 - Conducting all mutually (CDA candidate and PD Specialist) agreed-upon and scheduled CDA Verification Visits.
 - Allowing a minimum of four (4) hours to complete each scheduled visit.
 - Scheduling and conducting no more than two (2) CDA Verification Visit® evaluations per day.
 - Submitting to the Council all required candidate assessment scores (utilizing approved Council forms), within 1 to 2 business days after completing the candidate CDA Verification Visit® evaluation or before the CDA candidate’s six- (6) month expiration deadline (whichever comes first), in accordance with Council policies and procedures.

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

II. VOLUNTEER SERVICES

As a volunteer operating in the role of a PD Specialist, I further understand and agree that: I am not permitted to charge CDA candidates or related programs any additional fees or request reimbursement for expenses when conducting a CDA Verification Visit® or paper exam with a CDA candidate. Should I violate this policy, I understand that my services as a CDA Professional Development Specialist™ under this agreement will be terminated immediately and I will not be permitted to reapply.

1. I will notify the Council and explain in detail if I have conflicts of interest that may make it inappropriate to serve as a PD Specialist for a candidate.
2. All CDA candidate information, CDA Verification Visit® data, CDA Verification Visit® results, the online PD Specialist Portal, online passwords, and other data that I may handle during my volunteer service as a PD Specialist are confidential, and may not be copied, revealed or shared with any unauthorized party.
3. I will protect the privacy rights of CDA candidates and the Council in all information disclosed to me about the candidates acquired before, during and after the CDA assessment process. All confidential information will be maintained in strict confidence.
4. I will promptly notify the Council when I am no longer available to serve as a PD Specialist and understand that once my departure from the PD Specialist Program is effective, my access to *YourCouncil* and my name and contact information in the PD Specialist Directory will be removed.
5. I will handle the CDA assessment and testing instruments ethically and agree to protect the confidentiality of the candidate’s Comprehensive Scoring Instrument (CSI) and the paper exam and CDA Verification Visit® scores submitted.

6. I understand that Council staff will be enacting a quality assurance process to randomly monitor the services outlined in this volunteer agreement. I agree to fully participate in the Council's quality Assurance Process and cooperate with Council staff tasked with that responsibility.
7. I also understand that the Council will treat my personal information as confidential and will use it for internal administrative purposes only and will not share it with third parties except on a "need to know" basis in furtherance of the Council's business. For either party, confidential information may be provided to a third party if it is pursuant to a valid order of a court or other government body.

III. NO COMPENSATION

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

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

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

IV. OTHER TERMS AND CONDITIONS

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

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

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

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

3. I further understand and agree that:

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

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

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

Important Information

Council Website	www.cdacouncil.org
Council Website en Español	www.cdacouncil.org/es/
PDS Portal in <i>YourCouncil</i>	yourcouncil.org (Verification visits and Scoring Tool)
PDS Community Page (Login required)	www.cdacouncil.org/pds-community/
ECE Observations Team	pds@cdacouncil.org
Phone Number	(800) 424-4310
Fax Number	(202) 265-9161
Mailing Address	Council for Professional Recognition 2460 16th Street NW Washington, DC 20009
Join the PDS Group within the Council Alumni Network (CAN)	councilcan.org
Council X (also known as Twitter)	www.twitter.com/cdacouncil
CounciLINK Newsletter	www.cdacouncil.org/newsletter
PDS YouTube Channel	Go to PDS YouTube Channel

COUNCIL
for
**PROFESSIONAL
RECOGNITION**



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