College and Career Competency Manual

August 2020

Contents

* Copy available on NEDP Professionals page

Purpose

The College and Career Competency (CCC) is a critical component of the NEDP. This individualized competency complements the applied academic and technology skills that NEDP graduates demonstrate throughout the program and highlights these skills in the context of college and career goals of the NEDP participants. The CCC recognizes the life and work experience of NEDP clients and documents employment and advanced academic skills that can be applied to obtaining, retaining, or advancing in a job and/or entering postsecondary training and education.

The CCC is designed to optimize credential attainment and verify the success of the NEDP client in securing marketable skills, credentials, employment, and further education and employment opportunities. In alignment with the Workforce Opportunity and Innovation Act (WIOA), NEDP agencies are strongly encouraged to collaborate with WIOA partners to assist clients in identifying educational and career goals in specific career pathways leading to high-demand jobs that pay well. Career pathway systems, as informed by local labor market trends, help the client gain industry-recognized and academic credentials needed to work in the most in-demand occupations.

The CCC, along with education attainment documented through the NEDP Generalized Assessment, aids the client in preparation to enter the workforce, upgrade skills, advance to a better job, or move from one field of work to another. For youth or individuals with limited work experience, the CCC verifies that a NEDP graduate has the work readiness, situational judgment, problem solving and critical thinking skills to be successful in an entry-level job.

The flexibility of the NEDP allows the client to participate in Integrated Education and Training (IET) as outlined in WIOA and in fulfillment of the CCC.

The CCC provides three optional categories to document the skills needed for careers in the 21st century:

1. **Employment/Workforce Training Competency** allows the client to document work experience and employment training, including active participation in community volunteer activities or self-employed business success.
2. **Specialized Skill Competency** permits the client to demonstrate distinct competencies that provide a source of independent income.
3. **Transition to Postsecondary Competency** encourages the client to demonstrate readiness for postsecondary education and training and complete transition work to increase the likelihood of success.

The CCC can serve as an assessment of prior learning and skills development, a useful strategy to reintegrate veterans and reemploy dislocated workers by using skills learned during military service and other previous work experience.

In addition, information completed and organized by the client in the *College and Career Competency Inventory (CCCI)* may be useful when compiling resumes and job applications in any future job search.

Introduction

The *College and Career Competency Manual* provides NEDP practitioners with the procedures for assessing the individualized competency. Each NEDP client must fulfill the individualized CCC requirement, in addition to the competency skill demonstration required in the Generalized Assessment Phase. During the Diagnostic Phase, the Advisor, sometimes in consultation with other staff members, helps the client determine which method will be used to demonstrate the individualized skill. The CCC option is selected during the Diagnostic Phase of the program. The Assessor is responsible for monitoring the CCC demonstration.

Individualized competencies are those learned or developed by an adult through different kinds of work experience or training, or as a result of special and unique abilities. The CCC allows each client to individually determine how best to demonstrate personal skills in the context of college and career goals. NEDP clients range in age from youth to mature adults and reflect various life stages and experiences. The CCC allows for this disparity by providing a range of options that match individual life stages. The CCC allows the client to prepare for the workforce, upgrade skills, advance to a better job, or move to a different job field. Other options allow the client to document marketable skills, plan for a secure and fulfilling retirement, or demonstrate readiness to enter and complete postsecondary education and training. CCC individualized competencies may be verified in any one of the following categories:

1. Employment/Workforce Training Competency
2. Specialized Skill Competency
3. Transition to Postsecondary Competency

Because there is no one system or technique that could measure and document all of the possible individualized competencies with any degree of validity, various methods of documentation and criteria are established.

This manual describes the process the NEDP practitioner uses to guide the client in the identification of the appropriate individualized competency. The manual also serves to outline how the individualized competency is verified and measured. The criteria for the CCC ensures consistency nationwide.

Exploring Client Skills

The College and Career Competency Inventory (CCCI)

During the Diagnostic Phase, all clients complete the individualized *College and Career Competency Inventory (CCCI)*. This form provides information about a client's work experience, training, occupational licenses, talents, hobbies, and future educational plans. Additional input to this process may be taken from the exploration of O*NET, also completed during the Diagnostic Phase, to assist with the identification of the appropriate job title and knowledge, skills, abilities and work activities of any current employment. The completed CCCI will guide the Advisor in helping to determine the best means of fulfilling the CCC in one of the following three areas:

1. Employment/Workforce Training Competency
2. Specialized Skill Competency
3. Transition to Postsecondary Competency

Ordinarily, clients can complete the CCCl at home. They should be encouraged to answer all questions that apply to them as fully as possible. When the CCCI is submitted, the Advisor reviews it before discussing it with the client. In preparation for the discussion, a review form (*Review of CCCI*) is provided on page 30 for the Advisor. The Advisor and the client discuss any unanswered sections on the form, the dates given for training or employment, the scope and breadth of Specialized Skill, and/or the seriousness of plans for postsecondary education.

In many cases, the information given in the CCCI is sufficient to establish an individualized skill method, and the Advisor needs only to confirm with the client the individualized CCC recommendation.

If the client indicates no current or recent skills training or employment experience, it might be helpful to consider if a specialized skill is present. If neither option is feasible, the client may consider what postsecondary experience would lead toward a career that provides self-sufficiency, family-supporting wages, and the industry-recognized skills needed for in-demand jobs. NEDP recognizes that clients enter the program with different experiences, skills, and goals. Advisors will help each client explore all options available to determine the competency that best suits his or her individual needs.

Whenever more than one possibility is present, the client should make the final decision as to which individualized competency to demonstrate.

The Advisor needs to record all pertinent facts leading to the final choice on the CCCI, including correct name and address of the client’s supervisor or instructor, if applicable. The Advisor writes the final choice in the space provided on the CCCI.

Employment/Workforce Training Competency

When sufficient employment is indicated, the client must produce documentation such as timecards, pay stubs, or employer verification to fulfill the CCC requirement. A W-2 form may be helpful in verifying the employment history but may not be used as the only source of documentation as it cannot document part- or full-time employment and duration. When insufficient or no employment experience is identified, and no occupational license or employment training certificate produced, the client may decide to identify a career pathway of interest.

Clients too young to have gained employment experience, those that are underemployed or have been unsuccessful in retaining employment, and those new to our country and work culture may benefit from completing the CASAS Workforce Skills Certification System (WSCS) to fulfill the CCC requirement. Developed in partnership with employers from a range of industry sectors, WSCS assesses transferable, entry-level skills aligned to O*NET and Skills for the 21st Century. The Certificate certifies the attainment of high-level, basic academic and soft skills identified by employers as critical to successful entry to the workforce and ongoing career growth. NEDP agencies wishing to offer the WSCS option should refer to page 16 for more information, including the requirements for implementation or visit www.casas.org/docs/default-source/WSCS/WSCS-brochure.pdf?sfvrsn=6

If the client expresses a desire for more specific job training, this should be recorded and may be recommended as an alternative toward fulfilling the CCC requirement.

If a client indicates on the CCCI present enrollment in a career and technical education training program or has completed such a course in the past 12 months, the Advisor will make certain that all CCCI questions in that section are answered. The Advisor will need to verify the training program is one that is sponsored by a reputable school or agency and one that provides its graduates with skills that qualify them for a job or a number of jobs in a high-demand career pathway by checking with local employer Human Resource Departments, or local, state, or national workforce boards.

In the case of a client referred from a program in which job training is an integral part, such as Temporary Assistance for Needy Families (TANF), displaced worker programs, or the local American Job Center, the client who successfully completes all the Diagnostic Instruments may be permitted to begin the Assessment Phase of the NEDP while completing the skills training program. However, graduation cannot occur until the training is completed and documented by the Assessor.

If the client is unemployed and has no employment experience or need for work, is retired or is planning for retirement, has been a home manager for a number of years, and demonstrates no other apparent individualized competency, the Advisor can recommend that an assessment of the client's abilities in Personal and Management (PAM) Skills be completed through a portfolio assessment. The portfolio will document skills developed and applied in personal and management decisions within various life stages such as parenting and retirement, and/or fiscal management of the home, consumer advocacy and protection, and family advocacy. **No previously used individualized skills checklists can fulfill the CCC as of July 2016, including the *Basic Home Skills and Management Checklist*.**

When an unemployed client can offer no convincing evidence of a specialized skill, the client is encouraged to seek employment, enroll in a job-training program, complete a workskills certification program, or begin the process of planning for transition to postsecondary education or training**.** The client should be reminded that the CCC requirement must be completed before graduation can occur and the diploma is granted.

Specialized Skill Competency

When a client has developed a special interest or talent in areas such as music, art, photography, quilting or other creative areas that can be used as a possible source of independent income, the Advisor can explore the use of the *Specialized Skill Competency* for the demonstration of the individualized competency. The level of skill should always indicate some above-average talent or skill on the part of the client with the demonstration of those skills through a portfolio assessment, as described on page 31.

Transition to Postsecondary Competency

When the client indicates serious plans for postsecondary education, scores at the required skill levels of writing and math as determined by the Diagnostic Instruments, or has already begun some college-level classes, the completion of the *Transition to Postsecondary Competency* may be the most appropriate in helping the client to transition to whatever is next after graduation. The Advisor then outlines all the requirements for the portfolio demonstration, and the client, if interested, is asked to write a preliminary 250-word essay relating to long-term career aspirations and goals. The client should be urged to use the resources of the local workforce board or American Job Center to ensure that the personal career goals are targeted within a career pathway that leads to high-demand jobs with good pay. The content of the essay must also include an acknowledgement of the training required to fulfill the career goals. This essay is submitted during the Diagnostic Phase to help the Advisor determine the appropriateness of the assessment for the client and can be expanded later into the required Transition to Postsecondary Portfolio.

The client may be encouraged to use O*NET resources to identify future employment goals including a specific career pathway, job title and description, along with reasons it appeals to the individual.

Serving Re-entry Clients from Corrections

Agencies may see an increase in the number of corrections referrals from the WIOA American Job Centers, serving ex-offenders who have not been in the job force for more than a year or who have not used skills training in employment while incarcerated. The American Job Center will most likely assess the relevancy of any job skills training or experience that will aid the client in determining the appropriate CCC option:

- Employment experience, documented by the Job Center stating that the experience is still relevant in the current job market.
- Enrollment in job training, as sponsored by the local American Job Center. Training must be completed before NEDP graduation may occur.
- Completion of the Transition to Postsecondary Portfolio, with pre-employment counseling and assistance provided by the American Job Center.
- The client must complete six months of successful employment in a new job before NEDP graduation.

Confidentiality

It is critical that the option to keep participation confidential is provided each client in NEDP. If the client requests that option and is employed and eligible for employer verification, the letter to an employer requesting verification of job skills should not identify the NEDP by name. Where possible, the agency letterhead should be used. During the CCC interview in the Diagnostic Phase, the client who does not want the employer to know of the enrollment in the program should be shown the *Employment Verification Form* and made aware of the possibility that the employer might question its exact purpose. The client may prefer to provide other documentation to verify the employment such as the use of timecards or pay stubs, or to select a training option. However, the client should understand that the school board that awards the diploma is informed of the identity of all NEDP graduates when conferring the diploma, although the client may request not to be mentioned in any publicity or news accounts.

The client needs to be aware of exactly how the CCC will be handled. The client should review all letters before they are sent and sign information release statements for employment verification forms and training verification letters. If a client requests confidentiality, the Advisor should discuss with the client how it will affect the desired documentation.

Redaction Process for NEDP Individualized Competency Documents

Some of the required documentation may contain personal, sensitive or confidential information (e.g., W2 forms, timecards, and pay stubs may contain Social Security numbers). To ensure that this information does not remain in the client's file for others to access it must be redacted.

Redacting is the process of removing confidential, personally identifying information from documents prior to release to protect client confidentiality. Redacting protocol includes:

1. Make a copy of the original to redact.

2. Use cover-up tape, correction fluid or a black marker to block out sensitive information such as the client's Social Security number and salary information.

3. Photocopy the redacted version to produce a version void of the confidential information.

4. You now have an original and two copies of the document.
    a) Return the original copy to the client.
    b) Once you have redacted the sensitive information, file the photocopy in the client's file and/or save as a PDF document.
    c) Shred or otherwise destroy the copy that you redacted.

Table A: Required Documentation for College and Career Competency (CCC)

Option	Timesheet, Pay Stub, Employer Verification	License or Training Certificate	Portfolio
Employment/Workforce Skills Verification			
Part- or Full-time Employment with One or More Employers	X		
Part-time Seasonal Employment	X		
Occupational or Training Certificate		X	
Union Member	X		
Employed (Newly)	X		
Volunteer Service/Work Experience			X
Military Service, includes Reserve and National Guard	DD214 form		
Prior Employment	X		
Self-employment			X
Workforce Skills Certification System Certificate		X	
Personal and Management Skills Portfolio			X
Specialized Skill: Permits the client to demonstrate distinct competencies that provide a possible source of independent income.			X
Transition to Postsecondary: Encourages the client to demonstrate readiness for postsecondary education and training and complete transition work to increase the likelihood of success.			X

Assessment of Employment/Workforce Training Competency

The documentation of employment and workforce training skills allows the client to document work experience and work skills earned in a career and technical education training course. Timecards and pay stubs[1] with Social Security and other personal identification data blacked out, may be used to prove employment. A client may submit verification from more than one job or employer to substantiate employment for the required time.[2] If timecards or pay stubs are not available, the employer may be contacted to confirm the employment and job title.

If the client has not been employed for a sufficient amount of time, the client must understand that no diploma can be awarded until successful employment or completion or employment training can be documented according to the program's time requirements. A second possible individualized demonstration such as Specialized Skill, Transition to Postsecondary, or the Personal and Management Skills Portfolio assessment may be suggested as an alternative.

Employment Verification Options

NEDP research has shown that the opinions of employers vary as to the length of time required for a worker to learn job skills and establish work habits. General agreement is that job success and worker characteristics can be fairly evaluated at the end of 6 months on the job. To use an employment verification of a client's skills, one of the following employment conditions must be met:

1. The client must have held full-time or part-time job **(at least 10 hours per week)** for at least **six months** within the last **12 months**. The client may have been employed full-time or part-time by the **same or more than one employer**.

2. The client must have been employed for the entire duration of the employment period in a position that operates (because of inherent characteristics) for **less than 6 months a year** (e.g., teacher aide or seasonal jobs in construction or recreation). The past two seasons of employment are required.

3. The client must have a current **state-issued career and technical education training license** that has been earned through a **state or national testing procedure**. A copy of the license is filed in the portfolio. Similar recognition should be given to a **training certificate** awarded by an accredited training program that is recognized within the local employment field or appears on the *Eligible Training Provider Guide* of the local workforce board. The skills training must lead to a career pathway in a high demand field, as identified by the local or state workforce board. The course must be completed within the twelve-month period prior to the registration in the NEDP or be achieved during the period of enrollment in the NEDP. Participation in the NEDP may be

---

[1] A W-2 form may be helpful in verifying the employment history but may not be used as the only source of documentation.

[2] In many areas of the country employers are currently using part-time or short-term workers hired through temporary employment agencies. Workers in entry-level positions are often forced to work a series of part-time or short-term jobs.

extended until the necessary twelve-month period is complete. The diploma may not be granted until after the receipt of documentation.

4. The client must have been employed, through a **union**, part- or full-time for **six months (or the equivalent)**, within the last 12 months, performing the same job but perhaps at different locations, as assigned by the union's business agent. The letter requesting verification is directed to the business agent.

5. The client who is employed part- or full-time but has **not yet been on the job for six months** can qualify if the six-month tenure on the job is achieved during the period of enrollment in the NEDP. **Participation in the NEDP may be extended** until the necessary six-month period is complete. Diplomas cannot be issued until documentation is received.

6. The client who is contributing services in a volunteer position **over a six month period** can qualify if the skills needed to perform the job are usable in a paid position. The volunteer work must have been performed within the last 12 months. Clear documentation of the volunteer job must be provided including the number of hours provided and length of tenure, the corresponding O*NET job title, the description of duties and employer/coordinator verification. A portfolio assessment is used as indicated on page 33.

7. **Military service qualifies as full-time employment, regardless of when the service was completed**. (Military service offers training as well as well-defined and supervised work experience and provides the foundational skills to be successful in any job, regardless of when that service was completed.) As evidence of the military duties, a copy the **DD214 Form** is filed in the client's portfolio. Reserves and National Guard service is acceptable.

8. Verification by a former employer is acceptable when timecards and pay stubs are not available and under certain circumstances. A former employer can be contacted if:

   - The client was employed for at least **six months full-time** (or part-time as described in option 2 above). The previous employment must have occurred not more than one year prior to the signing of the registration form.

   - The client has retired from a company after passing that company's required number of years for **retirement** (age and service). The client must identify or locate a representative of that company having direct knowledge of the client's performance, and who is willing to verify successful employment. The former employer or supervisor or representative who had direct knowledge of the client's employment receives a different letter than the supervisors of currently employed clients. The same *Employment Verification Form* accompanies both letters. Timesheets, pay stubs or official company/employer retirement paperwork also may be used to document the employment.

9. Self-employed persons or small business owners are in a special category. They have no supervisor who can verify their possession of skills, and yet they are often highly skilled people. These clients may demonstrate the CCC by completing a portfolio assessment, specific to success of the business. The portfolio must include documentation of a minimum of six months of business operation including a representation of the following: (1) DBA (Doing Business As) documentation or current business license or listing in the Better Business Bureau; (2) company website and advertisements; and, (3) examples of current contracts for services or tax forms; (4) verification of services rendered; (5) business card/letterhead; (6) social media account. The documentation must demonstrate successful activity as a business owner. The Assessor should not evaluate the amount of money made in the endeavor but rather the owner's success in generating and maintaining the business in good standing with the Better Business Bureau and holding the proper and current business license.

10. Completion of the Workforce Skills Certification System (WSCS) Certificate may be used by clients with interest in entering the job market, those seeking better jobs, dislocated workers, and English Language Learners. Agencies wishing to offer this option to clients are referred to page 16 for more information on requirements and implementation strategies.

Employment/Workforce Training Skills can be reliably and validly assessed and documented by employers and vocational instructors. These experts include the following:

- The employers or supervisors of clients whose current skills on the job are to be validated. This verification is solicited by mail and documented on the *Employment Verification Form*. If an employer will be asked to verify employment skills, the Advisor makes certain that the client knows what information will be requested when the employer or supervisor is contacted. The client should review and approve the letter to be sent, and sign the release at this time. The Advisor must also be certain that the supervisor's correct name and address have been provided.
- The instructors of workforce training courses completed by clients. This verification is solicited by mail and requires entry-level skills certification by the institution (by means of a certificate) and by the instructor (through a letter). However, **if a client holds a training certificate with an official seal from a reputable training agency there is no need to seek instructor verification.** The Advisor should verify that the training program is accredited and recognized within the local employment field or appears on the *Eligible Training Provider Guide* of the local workforce board or American Job Center. The Advisor should also verify that the vocational training course leads to a career pathway in a high demand employment sector as identified by the state or local workforce board. Written verification by the instructor that entry-level skills in that field have been learned is only required if the training agency is closed, and the certificate is not available.

A summary matrix of the Employment Verification Options is available in Table B on pages 13-15.

Procedure for Completing Employer Verification

When there is a determination that Employer Verification is the most appropriate strategy to document employment experience, the Assessor mails the *Employment Verification Form* with the client's signed release and the appropriate letter signed by an Assessor or agency director to the employer or supervisor designated by the client on the CCCI. This submittal takes place after the client begins the Generalized Assessment Phase.

The *Employment Verification Form* has spaces for verification of the client's length of employment. It is considered acceptable when the following conditions are met and verified by the Assessor:

- All information requested is completed.
- The period of part-time or full-time employment conforms to the requirements as stated under the criteria on pages 8-9, and 13-15.
- The form is signed and dated.

If the form has not been returned within three weeks from the time it was mailed, a follow-up letter with a duplicate *Employment Verification Form* and a copy of the original letter is mailed. If, within two weeks, there is still no response, the client is contacted and either gives permission for the Assessor to contact the employer by telephone or the client follows up on the request personally.

When the completed *Employment Verification Form* is returned, the client's Assessor reviews the form. If the Assessor finds all the information complete and satisfactory, the form is initialed by the Assessor and placed it in the client's portfolio. If responses are omitted, the Assessor may call the employer to provide the missing information verbally, **if the client did not request confidentiality with the employer**. Information received by phone must be written on the client's *Employment Verification Form*, dated, initialed by the Assessor, and then placed in the client's portfolio.

If the signature is missing, the *Employment Verification Form* must be returned to the employer/supervisor. If this is not possible, the client must be advised that another means of satisfying the CCC requirement will need to be explored. If verification of employment is different from the *NEDP Employment Verification Form*, this different verification **must be approved by CASAS NEDP**.

Verification of Certification by a Training Program

A certificate awarded for completion of a career and technical education training program or an entry-level course in a vocational field such as Medical Billing and Coding, *A+* and *Microsoft Office* is acceptable documentation of an individualized skill if the following conditions are met:

- The course was completed within the 12-month period prior to registration in the NEDP, or completed concurrent with enrollment in NEDP. Graduation may not occur until completion of the training program.
- The training program is accredited and recognized within the local employment field as verified by local employer Human Resource departments, or appears on the *Eligible Training Provider*

Guide of the local workforce development center.

- Written verification by the instructor that entry-level skills in that field have been learned is only required if the training agency is closed, and the certificate is not available.
- The career and technical education training course leads to a career pathway in a high demand employment sector, as identified by the state or local workforce board.
- A copy of the certificate, with an official seal from the training agency, is filed.

During the Diagnostic Phase the Advisor is expected to verify that the training program is sponsored by a reputable school or agency and one that provides its graduates with skills that qualify them for a job or a number of jobs in a high demand career pathway by checking with local employer Human Resource Departments, or local, state, or national workforce boards.

In determining which training programs are acceptable, length of the instruction period can be a partial indicator but not the only one. Two courses might run for the same number of weeks or months but differ greatly in both quality and quantity of instruction. The most important guideline is whether such a training course provides the client with entry-level skills for a job in a specific career pathway. If in doubt, the Advisor can seek verification of the reputation of the training program's results from a local business or union official that employs workers in that field, or from the local American Job Center.

The client must produce a certificate of completion of the training or a transcript. A copy of the certificate and copies of all transcripts and other reports that verify that the course is accredited and recognized within the local employment field are then filed in the client's portfolio. If a client has not yet completed the training program, these procedures are carried out once the certificate has been awarded.

Any training program authorized for college credit may be acceptable. Any national certification that has been accepted at the local community college for college credit or those recognized by the local American Job Center should be accepted. Documentation would be a letter from a local community college or official college brochure information indicating the amount of credit given by that institution for the training program or examination, and an official copy of the client's transcript or scores from the examination. If seeking documentation by the local American Job Center, a letter or email from the Center is accepted.

Table B: Employment/Workforce Skills Verification

Criterion	Verification	Scenario in Which This Option Is Suitable	Status (Part-time or Full-time)	Hours (Minimum Hours per Week)	Duration	Period of Time in Which It May Have Occurred	Employer(s)	Evidence[3] (one of the following)
1	Part-time or Full-time employment with one or more employers	Individual is currently employed part- or full-time and may have one (1) or more employers.	Part-time or Full-time	10-40 hours	6 months	Within the past 12 months	One or more	Timesheet, pay stub, or Employment Verification Form, page 43
2	Part-time Seasonal Employment	Individual is currently employed part-time in seasonal sector (e.g., construction, landscaping).	Part-time or Seasonal	10 hours	6 months	Within the past two seasons of employment	One or more	Timesheet, pay stub, or Employment Verification Form, page 43
3	Occupational License	Individual has a state-issued occupational license (e.g., barbering, cosmetology, or welding).	Intern, practicum student, job shadow experience, or subsidized employment	Part-time or full-time 10-40 hours	Active status of one month in the past two years	License must be current (not expired)	See status options	Copy of state or nationally-issued occupational license. License indicates that it is current. License is recognized within the local employment field as indicated by the local workforce development center. Copy of license is filed.
4	Completed Career or Technical Training	Individual has completed career or technical training, either through an employer or in a classroom setting.	Intern, practicum student, job shadow experience, or subsidized employment	Sufficient hours to satisfactorily complete course	n/a	Within two years of enrollment	n/a	Certificate of course completion or Instructor Verification of completion
5	Concurrent Career or Technical Training	Individual is enrolled in career or technical training, either through employer or in a classroom setting, during enrollment in NEDP.	No employment requirement	Sufficient hours to satisfactorily complete course	n/a	During enrollment in NEDP	n/a	Client may identify this option in Diagnostics, but may not graduate until one of the following has been met: Certificate of course completion

[3] A W-2 form may be helpful in verifying the employment history as documented with timecards and pay stubs but may not be used as the only source of documentation as it cannot document number of hours and duration.

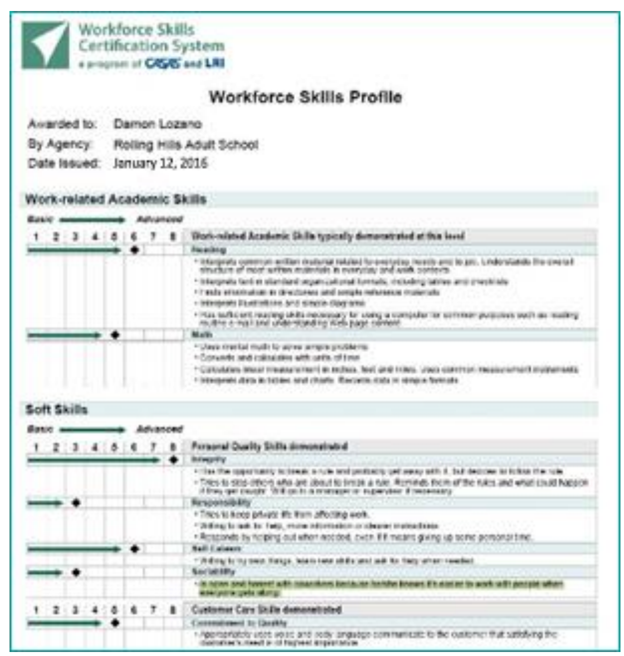
Criterion	Verification	Scenario in Which This Option Is Suitable	Status (Part-time or Full-time)	Hours (Minimum Hours per Week)	Duration	Period of Time in Which It May Have Occurred	Employer(s)	Evidence[3] (one of the following)
								or Instructor verification of completion
6	Union Member	Individual is a member of a union.	Part-time or Full-time	10 hours or 35-40 hours	6 months	Within the past 12 months	One or more	Letter verification of work.
7	Employed (newly)	Individual is newly employed at time of NEDP entry; individual has not yet worked for six (6) months at current employer, but will have worked for six (6) months at the time of, or soon after, completing Generalized Assessment.	Part-time or Full-time	10-40 hours	6 months	Current	One or more	Timesheet, pay stub, or Employment Verification Form, page 43. May be provided at the end of the program or after Generalized Assessment.
8	Volunteer Service/Work Experience Hours	Individual who performs skilled volunteer work or work experience hours.	Part-time	10 hours	6 months	Within the past 12 months	One or more	Portfolio Documentation, pages 33-34 Community Volunteer Verification Form, page 42
9	Military Service	Individual has current or prior military service including the National Guard.	Full-time	N/A	N/A	N/A	One	DD214 Form
10a	Prior Employment	Client can provide documentation of prior employment.	Part-time or Full-time	10-40 hours	6 months	Six or more months of prior employment, any part of which must have been within 1 year of NEDP entry	One or more	Timesheet, pay stub, or Employment Verification Form, page 43
10b	Prior Employment-Retired	Retired from employment	Part-time or Full-time	10-40 hours	6 months	N/A	One or more	Timesheet, pay stub, or Employment Verification Form OR

Criterion	Verification	Scenario in Which This Option Is Suitable	**Status** (Part-time or Full-time)	**Hours** (Minimum Hours per Week)	Duration	Period of Time in Which It May Have Occurred	Employer(s)	**Evidence**[3] (one of the following)
								Official company/employer retirement paperwork
11	Self-employment	Individual who is self-employed (e.g., caterer, owner/operated limousine driver).	Part-time or Full-time	10-40 hours	6 months	Within the past 12 months	One (self)	Portfolio Documentation, page 35
12	Workforce Skills Certification System (WSCS) Certificate	Clients with interest in entering the job market, those seeking better jobs, dislocated workers, and English Language Learners.	N/A	N/A	N/A	Completed concurrent with completion of Generalized Assessment and PTA	N/A	WSCS Profile and Certificate, page 16
13	Other Workforce Certificate, e.g. Career Readiness Certificate or Northstar Digital Literacy Certificate	Clients with interest in entering the job market, those seeking better jobs, dislocated workers, and English Language Learners living in Workforce Development Regions in which the workforce certificate is recognized.	N/A	N/A	N/A	Within the past five years	Agency has documentation on file that the WDB recognizes the credential	Documentation showing passing scores on the certification test or the certification itself.

Individuals seeking meaningful employment need strong work-related basic skills in order to work smart and grow on the job. National External Diploma Program (NEDP) clients need to be able to measure on-the-job skills already held, improve upon them, and take such practical knowledge into the workforce.

The **Workforce Skills Certification System (WSCS)** has been designed to document and develop these critical work-related academic and soft skills. The WSCS is unique in that both academic and workplace soft skills (on-the-job skills that help an individual succeed in the workplace) are assessed in tandem, and presented to job seekers and prospective employers in an integrated and useful format. The WSCS can be an important tool for collaboration with WIOA partners.

- **What is WSCS?**
  - WSCS measures workplace behavior (soft) skills with video-based assessments.
  - WSCS measures reading and math skills as found in common work settings.
  - WSCS allows clients to demonstrate critical thinking and problem-solving skills by responding to industry-based scenarios.
- **What are the steps in the Workforce Skills Certification System (WSCS) process?**
  - Step 1 – Assess and profile the work-related basic skills a person currently exhibits.
  - Step 2 - Develop these skills using feedback reports based on results from assessment.
  - Step 3 - Certify work-related basic academic and soft skills demonstrated at a high level.
- **The WSCS can benefit the NEDP <u>client</u> and specific populations, such as**
  - those with limited job experience and a goal to enter employment
  - English language learners with limited job experience in the US
  - dislocated workers seeking employment
  - ex-offenders re-entering the workforce
  - clients also served through American Job Centers



- **What is required to implement the WSCS?**
  - <u>CASAS eTests Online</u>
  - <u>TOPSpro Enterprise Software</u>
    - *One-time license fee*
    - *Annual support fee*
  - Workforce Skills Certificate Packages (WSP):
    - *One for each unique student enrolled in WSCS. Each WSP includes all WSCS-related reports and certificates*
  - *Training Required: WSCS Implementation Training*
- **How can I learn more?**
  - Visit the <u>WSCS web page</u> to obtain more information
  - Contact the WSCS team at <u>wscs@casas.org</u> for questions and current pricing

Assessment of Specialized Skill Competency

Summary of the Portfolio Review Procedure

The process of verification of CCC competencies by portfolio review, and performance when appropriate, involves these steps:

1. In the Diagnostic Phase, the Advisor confirms the experience, knowledge, level of talent or skill level of the client by an intensive interview around the established criteria and determines if the portfolio requirement would be a possible method of demonstrating the specialized skill, volunteer experience, self-employment, or the Personal and Management Skills option.
2. Upon completion of the Diagnostic Phase, the client receives the outline for the portfolio to be compiled. The client may indicate an interest to prepare for the Portfolio Review simultaneous with completing the Generalized Assessment Phase or concurrent with Post-Task Assessment (PTA).
3. When ready for the individualized assessment the client schedules an appointment with the Assessor for the presentation of a portfolio.
4. Clients who do not satisfy all the requirements for portfolio review or do not demonstrate skills according to the criteria listed for the portfolio must receive specific written feedback as to what needs to be changed or added. The client may continue to work on criteria that have not been met. If a second demonstration by the client is also unsuccessful, there may be one additional attempt two weeks later. If this also fails, the client must wait at least one month before trying again. One more attempt may be granted to demonstrate the missed competencies within the next month. Failure at this interview will determine that another means of satisfying the CCC requirement is identified. Only one such change, which may be initiated by the client at any point in the CCC process, is permitted.
5. Once the client has demonstrated all of the competencies satisfactorily, the Assessor signs the Certificate of Completion. This signed document, along with a copy of the Answer Form, is collected by the Assessor and is included in the client's portfolio.

Evaluating the Portfolio and Documenting the Results

The client submits the completed portfolio to the Assessor for evaluation during any phase of NEDP. The client must prepare the portfolio according to the specified portfolio requirements. Using the specified portfolio Answer Form as the criteria for evaluation, the Assessor evaluates the submitted materials.

Table C: Summary of the Portfolio Review and Performance Procedure

Steps of Portfolio Review Process	Timeline
Review Checklist and Procedures with the Client to confirm the level of talent or skill	In Diagnostic Phase
Client Receives the Outline for the Required Portfolio	Upon completion of the Diagnostic Phase
Conduct Performance Assessment Interview	At any time during Generalized Assessment Phase or within one month of completing Post-Task Assessment (PTA)
Reassessment of Non-demonstrated Competencies:	
• 1st reassessment attempt	Within two weeks
• 2nd reassessment attempt	Within two weeks
• 3rd reassessment attempt	One month
• 4th and Final Attempt – failure at this interview will determine that another means of satisfying the CCC requirement is identified. **Only one change, which may be initiated by the client at any point in the CCC process, is permitted.**	Within one month
Sign the certificate and file copy in client's portfolio.	At successful demonstration of assessment

The Assessor is responsible for ensuring that each of the portfolio requirements is demonstrated completely and correctly. The *Portfolio Report Form* is used to record evidence that is submitted by the client. Once the requirements have been completed, the Assessor fills out, signs, and dates this form. All materials are collected and filed in the client's portfolio including copies of pertinent test scores or transcripts.

Assessment of Specialized Competencies

Clients may be assessed for Specialized Skill competencies when a special interest or talent has prompted the development of refined skills in a given area, such as music, art, photography, alterations/quilting, etc. These skills are often self-taught or developed through participation in a variety of formal and informal learning activities. Although they may be considered by the client as skills acquired primarily for self-enrichment and personal satisfaction, they can also be used as a possible source of independent income, for example, from selling paintings or working as a photographer, dancer, or singer.

Specific skills such as these are more appropriately demonstrated through a portfolio review.

Portfolio requirements for such demonstrations are included in this document.

In some communities, adults might compile similar portfolios to seek college credit for the learning achieved through these activities. Any demonstration acceptable at that level would be more than adequate for high school-level demonstration.

In any case, the level of skill should always indicate some above-average talent or skill on the part of the client. If there is a question about the level of skill, the Advisor in the Diagnostic Phase may ask for a sample of the client's work. That sample could be reviewed by a college-level assessor prior to the decision about which individualized assessment method the client will use. This precaution will keep the Assessor from discovering at the end of the program that the client does not possess marketable skills in the identified area, leaving the client with no individualized competency and no high school diploma.

The Assessor should be willing to write specific feedback if any parts of the portfolio criteria are not demonstrated, so the client can remedy the parts missed.

If the client currently earns an income through the demonstration or use of the specialized skill, and has contracts for services or tax forms to document this income, the client may choose to use the self-employed workforce option as described on page 35.

Specialized Skill Portfolio Requirements

The client using the Specialized Skill Portfolio as the individualized CCC must demonstrate that above-average talent or skill is used in demonstrations, performances, exhibits, or as a source of income.

The content of the portfolio should contain the following information and representations:

- The number of years that the specialized skill is demonstrated.
- Where and how training was received and practiced. Clients within two years of traditional high school may use a high school transcript that documents a minimum of two years of experience in band, orchestra or chorus, or two semesters of art music, or theater classes.
- Representation of brochures, personal website, posters, and other strategies used to demonstrate the client's presentation or use of the skill in performances, exhibits, craft and art fairs, consignment shops, etc.
- Awards and recognitions received for the demonstration of the specialized skill should be included in the portfolio, if received.
- Documentation that the skill is shared at least 2-4 times a year in paid or unpaid demonstration or presentations.
- The compilation of representative examples of the specialized skill may take a variety of formats depending on the specialized skill. Examples may be presented as videos, pictures, or sample pieces of the art or product. Portfolio reviewers will need a copy of any videos, CD's, or pictures of sample art or product for the review process.

To satisfy the requirements of the *Specialized Skill Competency*, the client prepares a portfolio according to the criteria outlined in the *Specialized Skill Portfolio Requirements*, on page 31, in order to document these skills.

A client wishing to attempt the *Specialized Skill Competency* must demonstrate that above-average talent or skill is used in demonstration, performances, exhibits, or as a source of income.

The client may review the *Specialized Skill Portfolio Requirements*, outlined on page 31, during the Diagnostic appointment and use the checklist to prepare the requirements during the Generalized Assessment Phase, previous to PTA, or after PTA.

Community Volunteer Activities Portfolio Requirements

Active participation in community volunteer activities can be documented by preparing a portfolio of evidence that the Assessor will evaluate according to standard criteria.

Experience in community activities is documented in a portfolio that could convince an employer to view the client as having "real-world" job experience. The Community Volunteer Activities Portfolio serves to outline the level of skill demonstration accepted for verification of the CCC.

The following evidence is required for presentation in the Community Volunteer Activities Portfolio:

- Name of the organization where the volunteer work took place, including the address and website address, if applicable; name of the organization supervisor and the contact phone number and email address; dates of volunteer work (must be a minimum of 10 hours per week for 6 months) as verified by the organization's coordinator.
- The job title found in O*NET, *My Next Move* that best matches the knowledge, skill, and abilities used in the volunteer work.
- In a 250-word essay, the client is required to provide a description of the volunteer work that best describes the duties and activities performed with the organization that may be usable in a paid position in a related career pathway. This description should clearly outline how the duties performed as a volunteer relate to the job title identified in O*NET. The essay must be written with no errors in grammar, punctuation, and spelling, as it will become an official document with content to be verified by the organization's coordinator.
- Completed *Community Volunteer Verification Form* that validates the job description and dates of volunteer work.

Self-employed Business Owner Portfolio Requirements

Self-employed persons or small business owners are in a special category. They have no supervisor who can verify their possession of skills and yet they are often highly skilled people. These clients may demonstrate the CCC by completing a portfolio assessment, specific to the success of the business.

The portfolio must include documentation of a minimum of six months of business operation including a representation of **<u>three</u>** of the following:

1. DBA (Doing Business As) documentation or current business license or listing in the Better Business Bureau (BBB)
2. Company website
3. Advertisements
4. Verification of services rendered
5. Business card/letterhead
6. Social media account

The portfolio must also document that income was realized for the business, showing some successful activity as a business owner. Examples of contracts or receipts for services or tax forms, redacted to remove confidential data such as Social Security number, is required.

The Assessor should not evaluate the amount of money made in the endeavor but rather the owner's success in generating and maintaining the business as a going concern.

Personal and Management (PAM) Skills Portfolio Requirements

The Personal and Management Skills Portfolio replaces the *Basic Home Care and Management Checklist* accepted prior to July 1, 2016.

The portfolio must document skills developed and used in management of the home and family advocacy, including planning for various life phases such as parenting and retirement. The intent of this CCC option is to allow the client to demonstrate the ability to plan for the future or address a current personal issue crucial to maintaining a healthy home and ensuring family safety and security. In recognition that NEDP clients represent various ages and life stages, the Personal and Management Skills Portfolio option allows each client to determine the skills most appropriate for their family and life stage. Those clients currently in the parenting stage may determine a set of competencies that relate directly to the decisions they face as parents, or children of parents that need assistance. Clients involved in decisions related to retirement may choose from the available competency list those that relate specifically with planning for retirement. Other clients will choose from the available competency list based on conclusions already made or those that need exploration for their own family.

The client must prepare a portfolio in order to satisfy the requirements of the Personal and Management Skill competency, as described on pages 62-76. The completed portfolio includes the following:

1. Information gathered in the research phase of the competency. The client will collect the information found through investigation of the issue that may include copies of any print resources such as brochures and pamphlets from local providers, customer reviews or consumer reports, notes taken on site visits or phone calls, information found on websites, and newspaper or magazine articles. (2-4 pages)

2. A graphic that presents information and data gathered in the research process and clearly supports that the final decision is logical, realistic, and the most feasible for the client's personal and family circumstances. (1-2 pages)
3. A summary of the portfolio contents and final decision or conclusion. This may be accomplished in a 500-word essay or a 2-4 minute oral presentation[4] that uses a PowerPoint Presentation (PPT) for visual support. (minimum 500-word essay OR 2-4 minute oral presentation accompanied by a 6-10 slide PPT)
4. Properly cited resources, either in the portfolio, or as a hyperlink within the oral presentation so that they can be included in "real time" as the information is presented. (1 page OR 1 slide)

Refer to the **Activity** section of the competency description, pages 62-76 to identify what questions should be asked and what activities should be completed to demonstrate the competency selected. The content of the portfolio should reflect the specific competency being explored and the questions being answered. When more than one issue or product is being researched, the collected information should be organized within the folder so that the information for each is bundled, clipped, or organized together within the folder. Some possible items that might be included are the following:

- Notes from site visits or phone calls to service providers and retailers
- Brochures from service providers and companies
- Ads and trade magazine articles
- Customer reviews and consumer reports
- Steps or strategies to complete a task or develop a plan
- Answers to specific questions outlined in the competency
- A graphic that presents information and data gathered in the research process and clearly supports that the final decision is logical, realistic, and the most feasible for your personal and family circumstances. Some examples of the graphic are a chart, table or graph.
- Hard copies of web articles, as well as the URL that identifies where the article was found
- A copy of the PowerPoint, if the summary of the decision-making process is an oral presentation

The Assessor evaluates the essay or oral presentation, if recording capabilities are available based on the client's research strategies and resources used, outlined in a logical manner with graphics that support the data analysis. The final resolution in the decision-making process should be based on the client's needs, location, financial status, availability of resources and clearly tied to the completed research. Each essay must be written with minimal errors in grammar, punctuation, or spelling.

[4] The oral presentation is an option for a client only if the NEDP agency has the ability to record the presentation for review by the Portfolio Reviewer.

Assessment of the Transition to Postsecondary Competency

In the *Transition to Postsecondary Competency*, the client is required to demonstrate skills necessary to transition to the real-world demands of postsecondary training and education. The *Transition to Postsecondary Competency* is designed for alignment with the National College and Career Initiative which includes evidence that the client can clearly articulate defined goals and plans for implementation and demonstrate readiness to do college-level work without the need for remediation. Although these skills may have been acquired in a variety of formal and informal settings, the documentation must include the following:

1. Writing skills necessary for postsecondary training and education
2. The ability to clearly articulate future employment goals in a career pathway that pays enough to support a family and provides potential for advancement
3. A feasibility analysis that demonstrates an awareness of, and planning for, the mechanics of college or technical school attendance
4. Completion of transition preparation activities that moves the client toward enrollment in the specified postsecondary college or training program, in **one** of the following strategies:

    A. Sitting for the institution's entrance examination and receiving passing scores in all areas so that remediation is not required; or

    B. Meeting with the institution's admissions counselor to investigate enrollment requirements for the selected course of study; or

    C. Submitting a transcript from an accredited two-or four-year college showing satisfactory completion of any semester non-credit or credit course that is transferable to the selected institution in the client's transition plan. If the courses previously taken are not relative to the client's current employment goals but are accepted by the selected institution as proof of the prerequisite skills necessary for enrollment, the transcript should be accepted by the Assessor as satisfactory documentation. The client must provide proof of acceptance by the selected institution.

To satisfy the requirements of the *Transition to Postsecondary Competency*, the client prepares a portfolio according to the criteria outlined in the *Transition to Postsecondary Portfolio Requirements*, on page 38, in order to document these skills.

A client wishing to attempt the *Transition to Postsecondary Competency* must submit a 250-word essay during the Diagnostic Phase outlining the client's long-term career aspirations and goals, including a specific career pathway, job title and description, along with reasons why it appeals to the client. The content of the essay must also include a description of the training required to fulfill the career goal. If the client and the Advisor agree on this method of assessment to satisfy the client's individualized requirement, the same essay can later be expanded to 500 words to meet the portfolio criteria.

The Advisor uses the same criteria for evaluating the preliminary essay as it will be used to evaluate the final essay. If the client's essay contains many grammar, punctuation, or spelling errors or would require extensive rewriting on the first attempt, another method of completing the individualized assessment should be suggested. Assessors are encouraged to refer to the *NEDP Writing Style Guide* to assist in the evaluation of the essay

Unlike other individualized assessment demonstrations, the client cannot only review the *Transition to Postsecondary Portfolio Requirements*, on page 38, during the Diagnostic appointment, but can also use the checklist to prepare the essay. Once that first essay is accepted, the client may continue to work on the essay and the other requirements during the Assessment Phase.

Evaluating the Portfolio and Documenting the Results

The client submits the completed Transition to Postsecondary Portfolio to the Assessor for evaluation. The client must prepare the portfolio according to the *Transition to Postsecondary Portfolio Requirements*. Using the *Transition to Postsecondary Portfolio Answer Form* on page 40 as the criteria for evaluation, the Assessor evaluates the submitted materials.

The Assessor is responsible for ensuring that each of the portfolio requirements is demonstrated completely and correctly. The *Transition to Postsecondary Portfolio Answer Form* is used to record evidence that is submitted by the client. Once the requirements have been completed, the Assessor fills out, signs, and dates this form. All materials are collected and filed in the client's portfolio including copies of pertinent test scores or transcripts.

College and Career Competency Inventory (CCCI)

Please complete the following inventory. The information you present can help us become more knowledgeable about your individual experience and skills. With this information, it will be possible to determine the most effective way to verify your skills for fulfillment of the individualized College and Career Competency requirement.

Some of the information required may not apply to you. **Complete only those sections that specifically relate to your individual circumstances.** All information will be kept confidential.

---

1. Employment/Workforce Training Skills

Are you presently employed? [ ] Yes [ ] No *(If no, please skip to Section B)*

A. Job title: ____

Company name: ____

Address: ____

Supervisor's name[5]: ___________________________________

Briefly describe your duties and responsibilities using descriptions from O*NET where applicable.

____

____

____

How long have you held this job? From: ___________ To: __________

How many hours per week do you work? ______

How many months per year do you work? ______

Prior to this job, did you hold any other jobs with this employer? [ ] Yes [ ] No *(If no, please skip to Section B)*

Supervisor's name[5]: ___________________________________

Briefly describe your duties and responsibilities using descriptions from O*NET where applicable.

____

____

____

How long have you held this job? From: ___________ To: ____________

How many hours per week do you work? _______

How many months per year do you work? _______

[5] There will be no contact or communication with any current or previous supervisors without the express knowledge and consent from you the candidate.

B. Please list any job(s) with previous employers[6] and when you have held them.

Job title: ____

Employer: ____

Dates worked From: _______________________ To: _________________________

Job title: ____

Employer: ____

Dates worked From: _______________________ To: _________________________

Job title: ____

Employer: ____

Dates worked From: _______________________ To: _________________________

C. Have you had any job training? [ ] Yes [ ] No *(If no, please skip to Section D)*

What was it? ____

Where were you trained? ____

How long was the training? ______________ When were you trained? _______________

Did you receive a certificate upon completion? [ ] Yes [ ] No

D. Do you hold any current workforce skills license(s) or certificate(s)? [ ] Yes [ ] No *(If no, please skip to Section E)*

What license(s) or certificate(s)? ____

By whom was it issued? (i.e., New York State) ______________________________

When was it issued? ___________________________When does it expire? _____________

E. Do you give, or have you given, time to volunteer activities? [ ] Yes [ ] No *(If no, please skip to Section F)*

Position: ____

Organization name: ____

Address: ____

Contact name[7]: ___________________________________

Briefly describe your duties and responsibilities.

____

____

____

[6] There will be no contact or communication with any current or previous supervisors without the express knowledge and consent from you the candidate.

[7] There will be no contact or communication with any current or previous agency contacts without the express knowledge and consent from you the candidate.

How long have you held this volunteer position? From: ___________ To: __________

How many hours per week do you volunteer? ______

How many months per year do you volunteer? ______

F. Military Service

Have you served in the military? [ ] Yes [ ] No *(If no, please skip to Section G)*

In which branch did you serve? __________________

Did you have any special training while in the military? [ ] Yes [ ] No

If yes, please describe:

____

____

____

Please describe your general duties while in military service:

____

____

____

G. Self-employed

Do you currently own your own business? [ ] Yes [ ] No *(If no, please skip to Specialized Skill)*

____

Company name: ____

Address: ____

Briefly describe your business including products and services.

____

____

____

How long have you owned this company? From: ___________ To: __________

Briefly describe how you market your business, including such strategies as website, advertisements, business cards, and social media accounts.

____

____

Briefly describe how you document that income was realized for the business, such as examples of contracts, receipts for services, or tax forms.

____

____

2. Specialized Skill

Do you have any special skills or talents (e.g., art, music) that are different from those needed to perform your job or home responsibilities? [ ] Yes [ ] No

If yes, please describe:

____

____

Have you used your special skills or talents for income or have you displayed or performed your talents for others outside of the home and beyond family and friends? [ ] Yes [ ] No

If yes, please describe:

____

____

Do you have, or have you had, any hobbies? [ ] Yes [ ] No

If yes, what are they?

____

____

3. Training and Education Plans

Do you plan to enter any job skills training after earning your high school diploma? [ ] Yes [ ] No

If yes, what type of job skills training will you seek?

____

Do you know where you plan to enroll? [ ] Yes [ ] No

If so, where? ____________________

Do you plan to attend college after earning your high school diploma? [ ] Yes [ ] No

Have you taken any college courses? [ ] Yes [ ] No

If yes, where and when?

____

Did you complete the courses required to earn a certificate or degree? [ ] Yes [ ] No

If yes, when was it issued? If applicable, when does the certificate expire?

____

____

____

4. Personal and Management Skills

How many years have you had experience with or been responsible for the management of a household? __________ years

Please indicate with an ‘X’ your responsibilities in your home and for the people with whom you live in regards to the following:

Management Task or Decision	**Responsible**	**Not Responsible**
Identifying educational alternatives for children such as childcare, preschool, and K-12 options		
Purchase, selection, and use of home appliances including the use of warranties, cost-quality trade-offs, selecting a reliable dealer, evaluation of the features offered, credit terms, contracts, and use and care of the product		
Contract maintenance for utilities, cell phones, and the Internet		
Develop a plan for retirement including income, housing, insurance needs and options, and recognizing and planning for healthy lifestyles in retirement		
Researching the benefits of legal documents such as wills, trusts, Power of Attorney, and Health Care Directives		
Development of wills, trusts, estate planning, and elder care issues and resources		
Household budget planning including the selection, purchase, and monitoring of health care plan(s); selection, purchase and monitoring of insurance plan(s); and planning for retirement		
Home mortgage, including identification of home loan products		
Overseeing consumer advocacy issues for the family (such as implementing strategies to avoid identify theft		

Review of the College and Career Competency Inventory (CCCI)

1. Employment/ Workforce Training Skills

Option	Potential CCC	Not Applicable
Employment Experience		
Job Training		
Work Skills License		
Volunteer Work Experience		
Military Experience		
Self-employed Business Owner		

2. Specialized Skill

Option	Potential CCC	Not Applicable
Above average skill (e.g., music, art, photography)		
Potential source of income		
Performed or displayed skill or talent in public		

3. Training and Education Plans

Option	Potential CCC	Not Applicable
Plan to enter job skills training		
Plan to enter college		
Competed courses for certificate or degree		

4. Personal and Management Skills

Option	Potential CCC	Not Applicable
Holds primary responsibility for the management of the home • No plans to enter employment or job skills training • No specialized skill • No plans to enter postsecondary training or education		

Specialized Skill Portfolio Requirements

A client wishing to complete the CCC requirement through the *Specialized Skill Competency* will need to assemble a portfolio of work and documentation. The portfolio will include evidence of above-average talent or skills, documentation of specific job title and description of potential employment, a representation of how the skill is demonstrated or performed at least 2-4 times annually, documentation of income generated by the talent or skill (optional), and any awards or recognition received by the client for the demonstration of the talent or skill.

1. **Specialized Skill at above-average talent or skill level;** the client documents that the skill level allows for demonstration or presentation of the skill in paid or unpaid activities.
    - The client documents the number of years that the specialized skill is demonstrated, including where and how training was received and practiced. Clients within two years of traditional high school may use a high school transcript that documents a minimum of two years of experience in band, orchestra or chorus, or two semesters of art music, or theater classes.
    - Awards and recognitions received for the demonstration of the specialized skill should be included in the portfolio, if received.
2. **Description of Skill as used in demonstration, performances, exhibits**
    - The client produces a representation of brochures, personal website, posters, and other strategies to document the client's presentation or use of the skill in performances, exhibits, craft and art fairs, consignment shops, etc.
    - Documentation that the skill is shared at least 2-4 times a year in paid or unpaid demonstration or presentations.
3. **Documentation of the talent or skill used as a source of income, as appropriate**
    - The client produces documentation of specific job title and description of potential employment, using the identified skill or talent, including salary and benefit opportunities that exist for those utilizing the specialized skill for income.
    - The client provides documentation that the skill is shared with others outside the home and beyond family members at least 2-4 times a year in paid or unpaid demonstrations or presentations.

To be demonstrated, the Specialized Skill Portfolio must include the satisfactory demonstration of **all three** requirements above. Clients will submit these materials to the Assessor who will evaluate them according to the criteria and prepare a written report indicating which items need to be redone and resubmitted. A copy of that report will be sent to the client, and a copy included in the client's portfolio.

All the items required must be demonstrated satisfactorily before credit for the *Specialized Skill Competency* can be given. The client may work on items judged not demonstrated and resubmit them for evaluation according to the procedures established for non-demonstrated items in the evaluation criteria.

Specialized Skill Portfolio Answer Form

The client utilizing the Specialized Skill Portfolio as the individualized CCC must demonstrate that above-average talent or skill is used in demonstrations, performances, exhibits, or as a source of income. To satisfy the requirements of the *Specialized Skill Competency*, the client prepares a portfolio in order to document these skills.

The content of the portfolio contains the following information and representations:

1. The number of years that the specialized skill is demonstrated.

   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND

2. Where and how training was received and practiced. Clients within two years of traditional high school may use a high school transcript that documents a minimum of two years of experience in band, orchestra or chorus, or two semesters of art music, or theater classes.

   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND

3. Representation of brochures, personal website, posters, and other strategies used to demonstrate the client's presentation or use of the skill in performances, exhibits, craft and art fairs, consignment shops, etc.

   Representation of brochures, website, posters, or other strategies.
   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND
   Client presentation or use of skill.
   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND

4. Awards and recognitions received for the demonstration of the specialized skill are included in the portfolio, if received (optional).

   Assessor: ○ D ○ ND ○ NA
   Portfolio Reviewer: ○ D ○ ND ○ NA

5. Documentation that the skill is shared at least 2-4 times a year in paid or unpaid demonstration or presentations.

   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND

The compilation of representative examples of the specialized skill may take a variety of formats depending on the specialized skill. Examples may be presented as videos, pictures, or sample pieces of the art or product.

Community Volunteer Activities Portfolio Requirements

Active participation in community volunteer activities can be documented by preparing a portfolio of evidence that will be evaluated by the Assessor according to standard criteria.

Experience in community activities is documented in a portfolio that could convince an employer to view the client as having real-world job experience. The Community Volunteer Assessment Portfolio serves to outline the level of skill demonstration accepted for verification of the CCC.

The following evidence is required for presentation in the Community Volunteer Activities Portfolio:

- Name of the organization where the volunteer work took place, including the address and website address, if applicable
- Name of the organization supervisor and the contact phone number and email address
- Dates of volunteer work (must be a minimum of 10 hours per week for 6 months) as verified by the organization's coordinator.
- The job title found in O*NET, *My Next Move* that best matches the knowledge, skill, and abilities used in the volunteer work.
- In a 250-word essay, the client is required to provide a description of the volunteer work that best describes the duties and activities performed with the organization that may be usable in a paid position in a related career pathway. This description should clearly outline how the duties performed as a volunteer relate to the job title identified in O*NET. The essay must be written with no errors in grammar, punctuation, or spelling as it will be used as an official document with content to be verified by the organization's coordinator.
- Completed *Community Volunteer Verification Form* that validates the submitted job description and dates of volunteer work.

Community Volunteer Activities Portfolio Answer Form

The client utilizing the Community Volunteer Activities Portfolio must prepare a portfolio of evidence that documents volunteer work that could convince an employer to view the client as having real-world job experience. The Community Volunteer Assessment Portfolio serves to outline the level of skill demonstration accepted for verification of the CCC.

The following evidence is required for presentation in the Community Volunteer Activities Portfolio:

1. **Community Volunteer Activities:**

    - Name of the organization where the volunteer work took place, including the address and website address, if applicable
    - Name of the organization supervisor and the contact phone number and email address
    - Dates of volunteer work (must be a minimum of 10 hours per week for 6 months) as verified by the organization's coordinator.
    - The job title found in O*NET, *My Next Move* that best matches the knowledge, skill, and abilities used in the volunteer work.

      Assessor: O D O ND
      Portfolio Reviewer: O D O ND

2. **Description of the Volunteer Work**

    In a 250-word essay, the client is required to provide a description of the volunteer work that best describes the duties and activities performed with the organization that may be usable in a paid position in a related career pathway. This description should clearly outline how the duties performed as a volunteer relate to the job title identified in O*NET. The description and dates of volunteer work must be verified by the organization's coordinator. The essay must be written with no errors in grammar, punctuation, or spelling as it will be used as an official document with content to be verified by the organization's coordinator.

    - The 250-word essay fulfills all requirements listed above.

      Assessor: O D O ND
      Portfolio Reviewer: O D O ND

    - The organization's coordinator verified the dates of volunteer work and the job description as outlined in the 250-word essay.

      Assessor: O D O ND
      Portfolio Reviewer: O D O ND

Self-employed Business Owner Portfolio Requirements

Self-employed persons or small business owners are in a special category. They have no supervisor who can verify their possession of skills and yet they are often highly skilled people. These clients may demonstrate the CCC by completing a portfolio assessment, specific to the success of the business.

The portfolio must include documentation of a minimum of six months of business operation including a representation of **three** of the following:

1. DBA (Doing Business As) documentation or current business license or listing in the Better Business Bureau
2. Company website
3. Advertisements
4. Verification of services rendered
5. Business card/letterhead
6. Social media account

The portfolio must also document that income was realized for the business, showing some successful activity as a business owner. Examples of contracts or receipts for services or tax forms, redacted to remove confidential data such as Social Security number, is required.

The Assessor should not evaluate the amount of money made in the endeavor but rather the owner's success in generating and maintaining the business as a going concern.

Self-employed Business Owner Portfolio Answer Form

NEDP clients that are self-employed persons or small business owners may demonstrate the CCC by completing a portfolio assessment, specific to the success of the business.

The portfolio includes the following:

1. Documentation of a minimum of six months of business operation and **<u>at least three</u>** of the following representations or illustrations from their company or business:

    1. DBA (Doing Business As) documentation or current business license or listing in the Better Business Bureau

        Assessor: ○ D ○ ND
        Portfolio Reviewer: ○ D ○ ND

        Indicate the documentation used to verify the completion of this activity.

        ____

        ____

        ____

    2. Company website

        Assessor: ○ D ○ ND
        Portfolio Reviewer: ○ D ○ ND

        Indicate the documentation used to verify the completion of this activity.

        ____

        ____

        ____

    3. Advertisements

        Assessor: ○ D ○ ND
        Portfolio Reviewer: ○ D ○ ND

        Indicate the documentation used to verify the completion of this activity.

        ____

        ____

        ____

4. Verification of services rendered

   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND
   Indicate the documentation used to verify the completion of this activity.

   ____

   ____

   ____

5. Business card/letterhead

   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND

   Indicate the documentation used to verify the completion of this activity.

   ____

   ____

   ____

6. Social media account.

   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND

   Indicate the documentation used to verify the completion of this activity.

   ____

   ____

   ____

2. Income was generated by the business. Examples of contracts or receipts for services or tax forms, redacted to remove confidential data such as Social Security number, is required. The Assessor should not evaluate the amount of money made in the endeavor but rather the owner's success in generating and maintaining the business as a going concern.

   Assessor: ○ D ○ ND
   Portfolio Reviewer: ○ D ○ ND

   Indicate the documentation used to verify the completion of this activity.

   ____

   ____

   ____

Transition to Postsecondary Portfolio Requirements

A client wishing to complete the CCC requirement through the *Transition to Postsecondary Competency* will need to assemble a portfolio of work and documentation. The portfolio will include evidence of strong writing skills, academic skills needed for successful completion of postsecondary coursework, a feasibility analysis around the client's plans to attend postsecondary program, and the completion of one of three transition preparation activities.

1. **Goal Setting and Planning**

   The client will submit a typed essay containing information about future learning and employment goals. The essay must contain the following:

   - At least 500 words with minimal errors in spelling, grammar, punctuation and usage.
   - Identification of future employment goals including:
     - Career pathway
     - Specific job title and description
     - Salary and benefit opportunities of the career goal
     - Why the job and career goal appeals to the client
     - Training required, including time needed to complete the training program or course of study

2. **Feasibility Analysis**

   In a chart, graph, essay, or any combination (must be at least 250 words) the client demonstrates an awareness of, and planning for, the mechanics of postsecondary program attendance. This analysis must include the following:

   - The name of the institution being considered
   - Requirements for admission
   - Cost projections for a semester or year, including tuition, books, fees, parking, required uniforms or safety equipment (where applicable), etc.
   - Information about the availability of financial aid for adults at the selected institution (or in general) and what aid the client might be eligible for (if any)
   - Plans for how the client will handle at least two of the following issues: combined work and study, child care and study, transportation, perceived skill deficiencies, or any one additional issue specific to the client's situation

- All these written materials must be evaluated with the same standards as the essay

If the essay is judged unsatisfactory because of non-demonstration of any of these criteria it will need to be revised. The client will receive a written explanation of why it does not meet the stated criteria and may resubmit the essay up to four times.

3. Transition preparation activity

The client must complete and document **<u>one</u>** transition activity:

1. Documentation of passing scores in all areas of the institutions entrance examination that indicate that remediation is not required; or

2. Documentation of a meeting with the institution's intake counselor to investigate enrollment requirements for the selected course of study (see *Postsecondary Counselor Meeting Verification Form*, page 43, to assist with this effort or the client may have the counselor sign and date the appointment verification note, the institution brochure, enrollment requirements or course of study for the program being explored); or

3. Submission of a transcript from an accredited two-or four-year college showing satisfactory completion of any semester non-credit or credit course that is transferable to the selected institution in the client's transition plan. If the courses previously taken are not relative to the client's current employment goals but are accepted by the selected institution as proof of the prerequisite skills necessary for enrollment, the transcript should be accepted by the Assessor as satisfactory documentation.

Although the satisfactory demonstration of the Transition to Postsecondary Competency fulfills the individualized assessment requirement for the NEDP, it does not guarantee admission to college. Each college establishes its own application procedures and admission criteria.

Transition to Postsecondary Portfolio Answer Form

Criteria for Acceptable Demonstration of the Transition to Postsecondary Competency Portfolio

1. Goal Setting and Planning, as demonstrated by the Transition to Postsecondary Essay

The essay submitted by the client includes evidence of writing skills, academic skills needed for successful completion of postsecondary coursework, and a feasibility analysis around the client's plans to attend a postsecondary program. The completion of one of three transition preparation activities is also required.

The essay is:

- Typed and contains at least 500 words
- Well written and does not contain major errors in spelling, grammar, punctuation, and usage

Assessors are encouraged to refer to the *NEDP Writing Style Guide* to assist in the evaluation of the essay.

The essay demonstrates the client's ability to present clearly and articulately the personal identification of future employment goals including: career pathway, specific job title and description, salary and benefit opportunities of the career goal, why it appeals to the client, and the training required, including time needed to complete the training program or course of study.

Assessor: ○ D ○ ND
Portfolio Reviewer: ○ D ○ ND

2. Feasibility Analysis

The submitted chart, graph, essay, or any combination (must be at least 250 words) demonstrates the client's awareness of, and planning for, the mechanics of postsecondary program attendance, including the following:

- The name of the institution being considered
- Requirements for admission
- Cost projections for a semester or year, including tuition, books, fees, parking, required uniforms or safety equipment (where applicable), etc.
- Information about the availability of financial aid for adults at the institution considered (or in general) and what aid the client might be eligible for (if any)
- Plans for how the client will handle at least two of the following issues: combined work and study, child care and study, transportation, perceived skill deficiencies, or any one other issue specific to the client's situation

All these written materials must be evaluated with the same standards as the essay.

Assessor: ○ D ○ ND
Portfolio Reviewer: ○ D ○ ND

3. Completion of <u>one</u> transition preparation activity (indicate selection below):

- ☐ Documentation of passing scores in all areas of the institutions entrance examination that indicate that remediation is not required

- ☐ Documentation of a meeting with the institution's intake counselor to investigate enrollment requirements for the selected course of study. A form is available on page 43 of this manual to assist with this effort or the client may have the counselor sign and date the appointment verification note, the institution brochure, enrollment requirements or course of study for the program being explored

- ☐ Submit a transcript from an accredited two-or four-year college showing satisfactory completion of any semester non-credit or credit course that is transferable to the selected institution in the client's transition plan. If the courses previously taken are not relative to the client's current employment goals but are accepted by the selected institution as proof of the prerequisite skills necessary for enrollment, the transcript should be accepted by the Assessor as satisfactory documentation

Assessor: ○ D ○ ND
Portfolio Reviewer: ○ D ○ ND

Indicate the documentation used to verify the completion of this activity.

____

____

____

To be demonstrated, the Transition to Postsecondary Portfolio must include the satisfactory demonstration of **<u>all three</u>** requirements above. Clients will submit these materials to the Assessor who will evaluate them according to the criteria and prepare a written report indicating which items need to be redone and resubmitted. A copy of that report will be sent to the client and a copy included in the client's portfolio.

All the items required must be demonstrated satisfactorily before credit for the *Transition to Postsecondary Competency* can be given. The client may work on items judged not demonstrated and resubmit them for evaluation according to the procedures established for non-demonstrated items in the evaluation criteria under the autobiographical essay.

While the satisfactory demonstration of the Transition to Postsecondary Competency fulfills the individualized assessment requirement for the NEDP, it does not guarantee admission to college. Each college establishes its own application procedures and admission criteria.

Community Volunteer Verification Form

Volunteer information:

Name: ___________________________________

Job title: __________________________________

Hours per week: ____________________________

Date of start of service: _______________________

Agency Volunteer Coordinator information:

Company/Agency Name: ____

Address: ____

____

Phone: ____

Person completing form:

Name: ______________________________ Title:_______________________________

Signature: ____________________________ Date:______________________________

Release of information:

I hereby give my permission for the release of the foregoing information.

Signature:______________________________ Date: __________________________

Printed Name: ___________________________

Employment Verification Form

Employee information:

Name: ____________________________________

Job title: ___________________________________

Hours per week: _____________________________

Date of hire: ________________________________

Employee is currently employed: ____Yes ____No

Employment End Date (If not currently employed) _________________

Employer information:

Company Name: ____

Address: ____

____

Phone: ____

Person completing form:

Name: ______________________________ Title:_______________________________

Signature: ____________________________ Date:______________________________

Release of information:

I hereby give my permission for the release of the foregoing information.

Signature:______________________________ Date: ___________________________

Printed Name: ___________________________

Postsecondary Counselor Meeting Verification Form

Name of Client: _____________________________________

Date of Counseling/Intake Appointment: ____________________________________

Postsecondary Institution: ______________________________

Address: ____

____

Training or Degree Program Explored: ________________________

Agency Counselor information:

Name of Counselor: ____

Title of Counselor: ____

Phone:____

Signature: ____________________________ Date:_______________________________

Release of information:

I hereby give my permission for the release of the foregoing information.

Signature:_______________________________ Date: ___________________________

Printed Name: ____________________________

Community Volunteer Verification Letter

Duplicate on agency letterhead

Date

Client's Instructor
Title
Company
Street Address
City, State ZIP Code

Dear Mr. /Ms. ____________________________,

[Client Name] has applied to the National External Diploma Program as a client for a high school diploma. Partial credit toward this diploma may be given for entry-level skills acquired through the performance of community volunteer activities, provided the activities were completed within the past 12 months and supplied a minimum of 10 hours per week for at least six (6) months and the volunteer coordinator or supervisor verifies that the client has learned entry-level skills that could qualify for real-world job experience. [Client Name] submitted a description of the knowledge, skill, and abilities used in the volunteer work and a suggestion of what job title might best fit the work completed.

As the volunteer Coordinator of [volunteer organization name], you have been familiar with the services provided by this client. We would appreciate a brief statement from you verifying the client's participation in the program and, whether, in fact, entry-level skills were learned or demonstrated, as described by [Client Name]. If a description of the job duties is available, please include it.

Thank you for your cooperation and assistance.

Sincerely,

Assessor
NEDP

Release of Information: I hereby give permission for the information requested above to be released to the Assessor.

Signature: ____

Training Verification Letter

Duplicate on agency letterhead

Date

Client's Instructor
Title
Company
Street Address
City, State ZIP Code

Dear Mr. /Ms. ____________________________,

[Client Name] has applied to the National External Diploma Program as a client for a high school diploma. Partial credit toward this diploma may be given for entry-level skills acquired during an occupational training course, provided: The course has been completed within the past 12 months; certification has been awarded; and the instructor verifies that the client has learned entry-level skills that qualify her or him for a position in the field for which training was given.

As the instructor for the course in [course name], you have been familiar with the training received by this client. We would appreciate a brief statement from you verifying the client's participation in and completion of the program and, whether, in fact, entry-level skills have been learned. If an outline of the course is available, please include it.

Thank you for your cooperation.

Sincerely,

Assessor
NEDP

Release of Information: I hereby give permission for the information requested above to be released to the Assessor.

Signature: ____

Former Employer Verification Letter

Duplicate on *agency letterhead*

Date

Client's Former Supervisor
Title
Company
Street Address
City, State ZIP Code

Dear Mr./Ms. __________________________________,

[Client Name] is a participant in an educational program at [Agency Name].

Credit toward one requirement of this program may be awarded if an employer or supervisor who has had direct knowledge of the employee's work will complete a form verifying [Client Name]'s employment. The information requested is applicable to this educational program only. Completing this form in no way represents, nor will it be used as, a reference or recommendation for any future employment sought by the person for whom it was submitted.

We would very much appreciate your cooperation in completing the enclosed form and returning it in the envelope we have provided for your convenience.

Yours truly,

[Type your name here]

Enclosures

Current Employer Verification Letter

Duplicate on agency letterhead

Date

Client's Supervisor
Title
Company
Street Address
City, State ZIP Code

Dear Mr./Ms. ________________________________,

[Client Name] is a participant in an educational program at [Agency Name].

As part of this program, we ask that an Employment Verification Form be submitted by the employer or supervisor of the participant concerning his or her employment. The information requested is applicable to this program only, and in no way represents a reference or a recommendation for any future employment sought by the person for whom it was submitted. It will be used only for educational purposes.

We would appreciate your cooperation in completing the enclosed form, which will help us to further your employee's interests. If your company has its own job description for this position, it would be helpful if you would include a copy. If you have any questions or concerns about this procedure, please call me at [phone number].

Yours truly,

[Type your name here]

Enclosures

Follow-up to Employer's Verification Letter

Duplicate on agency letterhead

Date

Client's Supervisor
Title
Company
Street Address
City, State ZIP Code

Dear Mr./Ms. ________________________________,

On [date], the attached letter was mailed to you requesting your cooperation in completing an Employee Verification Form for your employee.

Since we have not received a reply, I was concerned that the letter and form may have been mislaid or lost in the mail. Therefore, I am enclosing duplicate copies of both. We would appreciate your completing the Employee Verification Form and returning it to my attention at your earliest convenience.

If you have any questions, please feel free to call me at [phone number]. Thank you.

Yours truly,

[Type your name here]

Enclosures

Personal and Management (PAM) Skills Portfolio Requirements – Directions for the NEDP Client

The College and Career Competency (CCC) may be completed by demonstrating your ability to plan for the future or address a current personal issue. If you choose this CCC option you are encouraged to select one of the 14 possible competency selections listed below that is most appropriate for your personal life stage and family situation.

PAM Options at a Glance

The NEDP client wishing to complete the PAM Portfolio must choose **one** competency from among the following 14 alternatives that are summarized below. Greater detail for each competency is found on the page indicated.

1. **Financial Management: Purchasing a Major Household Appliance –** Identify an appliance in your house that needs to be replaced. Collect information on at least two models. Explain how four of the five considerations provided added to your final choice. *Purchase of an appliance is not necessary for the completion of this competency* (pages 62-63).

2. **Consumer Advocacy: Avoiding Identity Theft** – Research three methods commonly used to steal an individual's identify. Investigate steps you can take to protect yourself and your family, and what steps to take once you determine the identity was stolen (page 64).

3. **Consumer Advocacy: Recognizing and Avoiding Common Scams and Fraud** – Research and define four common scams, identify warning signs there is a scam or fraud being proposed, and describe steps you can take to protect yourself from them (page 65).

4. **Consumer Advocacy: Online Security** – Research and discover how you can protect your electronic devices and personal data from theft, misuse, and destruction for each of four online security issues provided (page 66).

5. **Financial Planning: Homes and Mortgages** – Determine which type of mortgage plan would be best for you based on the estimated cost of a prospective home and the payment plan outlined for the mortgage plans. Determine what you will need in order to qualify including money saved toward a down payment, credit score, monthly housing budget, and the local housing market. *Purchase of a home or property is not necessary for the completion of this competency* (page 67).

6. **Financial Planning: Purchasing Life Insurance** – Explore the potential need for life insurance by researching term and whole life insurance. Define each type and determine the pros and cons of each relative to your needs and those of your family. *Purchase of a plan is not necessary for the completion of this competency* (page 68).

7. **Financial Planning: Purchasing Healthcare Insurance** – Choose between two options provided to explore healthcare insurance solutions for you and your family. Examine and analyze two providers in your area that will best meet your needs based on your level of health, cost projections, drug coverage, deductibles, copays and co-insurance. *Purchase of a plan is not*

necessary for the completion of this competency (page 69).

8. **Parenting: Childcare and Preschool Options** – Examine the childcare and preschool options available in your area that meet the individual needs of your child's maturity and education level. Visit at least two providers in your community to help you identify the best option for your child based on quality, cost and education program. *Enrollment is not necessary for the completion of this competency* (page 70).

9. **Parenting: Educational Issues and Options – School Systems** – Identify what school system is best for your child by exploring and visiting the available options in your area including public, charter, and private schools. You might also consider exploring homeschooling your child. *Enrollment is not necessary for the completion of this competency* (page 71).

10. **Parenting: Understanding an Individualized Educational Plan (IEP) and Advocacy for a Special Needs Child** – Research your role, responsibilities and rights as a parent or guardian in developing your child's Individualized Education Plan (IEP); explore strategies and recommendations on how to work collaboratively with the school to ensure your child receives the most appropriate services; identify and list resources available to you as the parent or guardian that provide information, support, and advocacy (page 72).

11. **Retirement: Financial Considerations** – Predict your needs and goals for your retirement years and draft a plan to support them, with various options and costs (page 73).

12. **Retirement: Planning for a Healthy and Satisfying Lifestyle** – Consider and plan for how you will spend your retirement years by planning for activities, options, and resources to help you meet your goals. Research the available options, costs associated for each, any training that might be needed, approximate time commitment, and any potential cautions (page 74).

13. **Family Support: Elder Care Issues** – Based on physical, financial, and everyday life needs, determine which housing option is most appropriate for the care of an older family member or in preparation for your own care. Visit and collect information on at least two senior housing options or two local services or resources available in your area to provide necessary support. *Enrollment is not necessary for the completion of this competency* (page 75).

14. **Personal Legal Affairs: Legal Documents** – Research the benefits of acquiring the following legal documents as well as the procedure for acquiring each one in your state:

    - will
    - power of attorney
    - health care directive
    - guardianship

    Use a free online legal form to complete one of the legal documents. Include in your portfolio and presentation the steps necessary to make the document legal and answer the four questions posed with the competency description, as indicated on page 68.

If you have already secured one of the legal documents, you may submit the signed page as documentation of the completed competency along with a brief essay describing what benefit of the document prompted you to initiate acquiring it and the process you used to accomplish this task (page 76).

Note: Advisors and Assessors will protect the confidentiality of your documentation by ensuring that personal, confidential, and sensitive information is removed before the documents are stored in your file.

You must prepare a portfolio in order to satisfy the requirements of the *Personal and Management Skill Competency*. The completed portfolio includes the following:

1. Information gathered in the research phase of the competency. Collect the information you find through your investigation of the issue that may include copies of any print resources such as brochures and pamphlets from local providers, customer reviews or consumer reports, notes taken on site visits or phone calls, information found on websites, and newspaper or magazine articles (2-4 pages).
2. A graphic that presents information and data gathered in the research process and clearly supports that the final decision is logical, realistic, and the most feasible for your personal and family circumstances (1-2 pages).
3. A summary of the portfolio contents and final decision or conclusion. This may be accomplished in a 500-word essay or a 2-4 minute oral presentation[8] that uses a PowerPoint Presentation (PPT) for visual support (minimum 500-word essay OR 2-4 minute oral presentation accompanied by a 6-10 slide PPT).
4. Properly cited resources, either in the portfolio, or as a hyperlink within the oral presentation so that they can be included in "real time" as the information is presented (1 page OR 1 slide).

Steps to Complete the PAM Portfolio	
Steps	**Directions**
1	Determine, with the assistance of your Advisor, which of the 14 PAM competencies addresses an important life decision you are facing or have accomplished.
2	Read the extended description of the competency selected, **as provided by your Advisor**. The requirements for each of the competencies are described more thoroughly in the **Activity** section which details information that can be gathered to form the research process, content, and questions to be answered. The competency descriptions include possible resources to be explored. Some of the competency descriptions suggest a format for the supporting graphics and some list specific questions to be answered in the completion of the research.

[8]Note: an oral presentation is an option only if the NEDP agency has the capability to record the presentation for review by the Portfolio Reviewer.

Steps to Complete the PAM Portfolio	
Steps	**Directions**
	Note: None of the competencies require the actual purchase of a product, enrollment in a program or agency, or payment of services.
3	Identify what factors you will consider to make the required decision or selection based on your family needs, financial status and availability of services in your area.
4	Complete the research needed to determine what services or options are available to you to inform your decision. For some decisions, a visit to school sites, school district office, or care homes will be completed with notes taken and compiled. For other competency decisions, much of the research will be completed online by exploring several websites.
5	Collect the information you find through your research in a portfolio, or folder, that contains copies of any print resources such as brochures and pamphlets from local providers, notes taken on site visits or phone calls, and newspaper or magazine articles. The portfolio may be a paper folder or an electronic folder to be shared with your Assessor. You are required to properly cite all resources used in your research. If the Internet is used to gather information include a screen capture and URL of the online resource in the portfolio to reference websites used in your research.[9] If opting to present the portfolio in an oral presentation[10], you may choose to cite the resources as a hyperlink within the presentation so that they can be included in "real time" as the information is presented.
6	Organize the information you gathered logically and in a way to allow you to compare and contrast the various options available to you. The information found in the graphic should visually show how the various options are different or alike and clearly support the final decision, showing it as the most feasible for the personal and family circumstances. Create a graph, table, or chart that visually shows how the various options are different or alike.
7	Make a decision for the competency you have chosen based on the information gathered and what is best for your personal needs, location, financial status and availability of services.
8	Provide a summary of your research findings in the form of an essay or oral presentation. Include a statement that contains your final decision. The essay or oral presentation must include: • A statement of what personal or family decision was made. • The most important factors considered when examining products, agencies, or option when making the decision. • The resources examined and used to help reach a final decision. This may include such resources as visits to sites, interviews with experts, and information collected from the Internet, brochures, and newspaper or magazine articles.

[9] Note: the portfolio must be saved as an electronic file such as a *MS Word or PowerPoint document.*
[10] Note: an oral presentation is an option only if the NEDP agency has the capability to record the presentation for review by the Portfolio Reviewer.

Steps to Complete the PAM Portfolio	
Steps	**Directions**
	• Explanation of the chart, graph, or table that presents information and data gathered in the research process. The information found in the graphic should visually show how the various options are different or alike and clearly support the final decision, showing it as the most feasible for the personal and family circumstances. • The reasons and logic used to make the final decision. ***Note: the oral presentation option requires that a PPT is used to visually support the presentation.***

You may opt to present the summary of the decision-making process in an essay or an oral presentation[11].

Refer to the **Activity** section of the competency description to identify what questions should be asked and what activities should be completed to demonstrate the competency you selected. **The content of the portfolio should reflect the specific competency being explored and the questions being answered**. When more than one issue or product is being researched, the collected information should be organized within the folder so that the information for each is bundled, clipped, or organized together within the folder. Some possible items that might be included are the following:

- Notes from site visits or phone calls to service providers and retailers
- Brochures from service providers and companies
- Ads and trade magazine articles
- Customer reviews and consumer reports
- Steps or strategies to complete a task or develop a plan
- Answers to specific questions outlined in the competency
- A graphic that presents information and data gathered in the research process and clearly supports that the final decision is logical, realistic, and the most feasible for your personal and family circumstances. Some examples of the graphic are a chart, table or graph
- Hard copies of web articles, as well as the URL that identifies where the article was found
- A copy of your PowerPoint, if you are presenting the summary of your decision-making process as an oral presentation

[11] Note: an oral presentation is an option only if the NEDP agency has the capability to record the presentation for review by the Portfolio Reviewer.

Assessment Criteria for the PAM Essay and Oral Report[12] Requirements

For the Personal and Management Skills Portfolio requirement you have an option of writing a 500-word essay **or** preparing an oral presentation of the portfolio contents and final decision or conclusion. Your Assessor will evaluate the essay or oral presentation based on the following criteria:

<table>
<tr><th colspan="2">Assessment Criteria for the PAM
Essay and Oral Report</th></tr>
<tr><th>ESSAY</th><th>ORAL PRESENTATION</th></tr>
<tr><td>Minimum of 500 words</td><td>2-4 minute in length and supported with 6-10 PowerPoint slides.</td></tr>
<tr><td>Contain minimal errors in spelling, punctuation and mechanics.</td><td>Use effective speech and body language.
Content:
Be prepared and knowledgeable about your topic.
Be clear and concise. Ensure your presentation is well organized.
Begin by explaining what you are going to discuss. Use transitions between topics, and end by summarizing what you have said.
Speech:
Speak confidently at a normal pace, or slightly slower than usual. Emphasize key words or ideas.
Use notes to guide your presentation, but try not to read them to your Assessor. Your notes should include only the main points of your presentation; refer to them solely to keep yourself on track.
Speak clearly.
Conduct:
Stand or sit in a natural, upright way. Look at your assessor and make eye contact from time to time.
Start and end your presentation in a timely manner.</td></tr>
<tr><td>Information is presented logically.</td><td>Information is presented logically.</td></tr>
</table>

[12] Note: an oral presentation is an option only if the NEDP agency has the capability to record the presentation for review by the Portfolio Reviewer.

Assessment Criteria for the PAM Essay and Oral Report	
ESSAY	**ORAL PRESENTATION**
Identification of the critical factors necessary to make the required decision or selection based on your family needs, financial status and availability of services in your area.	Identification of the critical factors necessary to make the required decision or selection based on your family needs, financial status and availability of services in your area.
Explanation of how the research was approached to determine available information and resources; e.g., searched the Internet, visited a community-based organization or service provider, read newspaper or magazine articles, pamphlets, viewed TV ads, etc.	Explanation of how the research was approached to determine available information and resources; e.g., searched the Internet, visited a community-based organization or service provider, read newspaper or magazine articles, pamphlets, viewed TV ads, etc.
Analysis of the Data Gathered: Explanation of how the various options discovered in your research are different or alike and clearly support the final decision, describing how it is the most feasible for the personal and family circumstances. The Assessor will refer to your graphic, in the portfolio, that should visually show how the various options are different or alike.	Analysis of the Data Gathered: Explanation of the chart, graph, or table that presents information and data gathered in the research process. The information found in the graphic should visually show how the various options are different or alike and clearly support the final decision, showing it as the most feasible for the personal and family circumstances.
Resources are properly cited.	Resources are properly cited. This may be accomplished by using as a hyperlink within the presentation so that they can be included in "real time" as the information is presented.
A statement of the final decision made.	A statement of the final decision made.

Personal and Management (PAM) Skills Portfolio Requirements – Directions for the NEDP Advisor and Assessor

Overview:

Most clients fulfill the College and Career Competency (CCC) requirement by documenting successful employment or planning their transition to the workforce, training, or education. Some clients have no recent employment experience, are not planning to make a transition, and have no Specialized Skill. These clients have the option of demonstrating their ability to plan for the future or address current personal issues by completing the Personal and Management (PAM) Skills Portfolio.

Clients who choose the PAM as their CCC option will select one of the fourteen (1-14) possible competency options most appropriate for their personal life stage and family situation. Individually the PAM options reflect major life situations about which many adults have to make complicated decisions. These issues require clients to identify resources, conduct research, and analyze their findings to reach a decision or make a selection.

To demonstrate mastery of the competency, the client will gather the collection of information used to make an informed decision into a portfolio that does the following:

- documents the data, information, and resources found to inform the decision or selection;
- compiles the information, notes, and data discovered in the research process;
- compares different options for solving the problem or making the decision, in both written and graphic form (e.g., chart, graph, table, etc.); and
- analyzes the data and results and makes a case for the final decision or selection.

The NEDP client wishing to complete the PAM Portfolio must choose one competency from among the following fourteen alternatives listed below:

1. Financial Management: Purchasing a Major Household Appliance
2. Consumer Advocacy: Avoiding Identity Theft
3. Consumer Advocacy: Recognizing and Avoiding Common Scams and Fraud
4. Consumer Advocacy: Online Security
5. Financial Planning: Homes and Mortgages
6. Financial Planning: Purchasing Life Insurance
7. Financial Planning: Purchasing Healthcare Insurance
8. Parenting: Childcare and Preschool Options
9. Parenting: Educational Issues and Options – School Systems
10. Parenting: Understanding an Individualized Educational Plan (IEP) and Advocacy for a Special Needs Child
11. Retirement: Financial Considerations
12. Retirement: Planning for a Healthy and Satisfying Lifestyle
13. Family Support: Elder Care Issues
14. Personal Legal Affairs: Legal Documents

Directions for the Advisor

Give a copy of ***Personal and Management (PAM) Skills Portfolio Requirements – Directions for the NEDP Client*** to the client.

Once the client determines which of the 14 competencies is the most appropriate based on personal and family circumstances, **provide the extended description of the competency, as found on pages 62-76.**

Review the competency with the client and ensure that the client understands that s/he must

1. Compile a portfolio which may be in folder format or an electronic folder[13] that you can access.
2. Provide a summary of the of the research completed and final decision made in the form of a 500-word essay, or an oral presentation of 2-4 minutes, supported with at PPT.

The requirements for each of the competencies are described more thoroughly in the *Activity* section which details information that can be gathered to form the research process, content, and questions to be answered. The competency descriptions include possible resources to be explored to guide the client. Some of the competency descriptions suggest a format for the supporting graphics and some list specific question to be answered in the completion of the research.

None of the competencies require the actual purchase of a product, enrollment in a program or agency, or payment of services.

The assessment of the portfolio is based on how the research and decision targets the client's personal needs, location, financial status and availability of services.

Directions for the Assessor

Redaction Process for Individualized Competency Documents

Some of the required documentation may contain personal, sensitive or confidential information (e.g., W2 forms, timecards, and pay stubs may contain Social Security numbers). To ensure that this information does not remain in the client's file for others to access, **<u>it must be redacted</u>**.

Redacting protocol includes the following:

1. Make a copy of the original to redact.
2. Use cover-up tape, correction fluid or a black marker to block out sensitive information such as the client's Social Security number and salary information.
3. Photocopy the redacted version to produce a version void of the confidential information.
4. You now have an original and two copies of the document.
    a) Return the original copy to the client.
    b) Once you have redacted the sensitive information, file the photocopy in the client's file and/or save as a PDF document.
    c) Shred or otherwise destroy the copy that you redacted.

[13] The portfolio must be saved as an electronic file such as a *MS Word or PowerPoint document.*

PAM Portfolio Evaluation Criteria – Essay Presentation

The client documents skills developed and used in management of the home, family advocacy, or planning for various life phases such as parenting and retirement by completing the PAM Portfolio. To satisfy the requirements of the selected PAM competency, the client prepares a portfolio to document these skills. The client presents the portfolio contents and final decision or conclusion in a presentation using a 500-word essay or 2-4 minute oral presentation.

The portfolio should contain a logical approach to defining a problem, researching a solution, making an informed decision, and documenting the reason for this decision. The client presents the summary of the decision-making process in an essay or an oral presentation that is evaluated as described below.

The presentation should be persuasive in tone as the final decision-making process is described. Clients are required to include at least one graphic to help support their written or oral presentation. The graphic may be in the form of a table, chart or graph, clearly supporting that the conclusion is logical, realistic, and the most feasible for their personal and family needs, location, financial status and availability of services. Clients are required to properly cite all resources used in the research.

Essay Format:

Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	1. The logical, persuasive **essay** includes a minimum of 500 words and contains minimal errors in spelling, punctuation, and mechanics.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	2. The personal and family decision is identified and the factors contributing to that decision are appropriate to the family needs, location, financial status and availability of services.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	3. The resources used to research possible solutions to consider are clearly and logically presented and appropriate to the issue.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	4. All resources are properly cited.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	5. The data gathered in the research process to compare various options is clearly and logically organized and presented.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	6. The statement of the final decision (or selection) correlates closely with the information presented.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	7. The supporting chart, graph, or table that presents information and data gathered in the research process clearly supports that the final decision (or selection) is logical, realistic, and the most feasible for the personal and family circumstances.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	8. Assessment of the portfolio file: Information collected in response to the **Activity** section of the competency description (2-4 pages).

PAM Portfolio Evaluation Criteria – Oral Presentation[14]

The client documents skills developed and used in management of the home, family advocacy, or planning for various life phases such as parenting and retirement by completing the PAM Portfolio. To satisfy the requirements of the selected PAM competency, the client prepares a portfolio to document these skills. The client presents the portfolio contents and final decision or conclusion in a presentation using a 500-word essay or 2-4 minute oral presentation.

The portfolio should contain a logical approach to defining a problem, researching a solution, making an informed decision, and documenting the reason for this decision. The client presents the summary of the decision-making process in an essay or an oral presentation that is evaluated as described below.

The presentation should be persuasive in tone as the final decision-making process is described. Clients are required to include at least one graphic to help support their written or oral presentation. The graphic may be in the form of a table, chart or graph, clearly supporting that the conclusion is logical, realistic, and the most feasible for their personal and family needs, location, financial status and availability of services. Clients are required to properly cite all resources used in the research.

Oral Presentation Format:

Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	1. The client uses effective speech and body language in the presentation. • Be prepared and knowledgeable about your topic. • Be clear and concise. Ensure your presentation is well organized. • Begin by explaining what you are going to discuss. Use transitions between topics, and end by summarizing what you have said. • Speak confidently at a normal pace, or slightly slower than usual. Emphasize key words or ideas. • Use notes to guide your presentation, but try not to read them to your Assessor. Your notes should include only the main points of your presentation; refer to them solely to keep yourself on track. • Speak clearly. • Stand or sit in a natural, upright way. Look at your assessor and make eye contact from time to time. • Start and end your presentation in a timely manner.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	2. The personal and family issue is identified and the factors contributing to the final decision or selection appropriate to the family needs, location, financial status and availability of services.

[14] Note: an oral presentation is an option only if the NEDP agency has the capability to record the presentation for review by the Portfolio Reviewer.

Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	3. The resources used to research possible solutions to consider are clearly and logically presented and appropriate to the issue.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	4. All resources are properly cited, either in the portfolio or as a hyperlink within the presentation so that they can be included in "real time" as the information is presented.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	5. The data gathered in the research process to compare various options is clearly and logically organized and presented.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	6. The statement of the final decision (or selection) correlates closely with the information presented.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	7. The supporting chart, graph, or table that presents information and data gathered in the research process clearly supports that the final decision (or selection) is logical, realistic, and the most feasible for the personal and family circumstances.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	8. The client uses a 6-10 slide PowerPoint Presentation to illustrate key points.
Assessor: *Portfolio Reviewer:*	○ D ○ D	○ ND ○ ND	9. Assessment of the portfolio file: Information collected in response to the **Activity** section of the competency description (2-4 pages).

PAM Alternatives (1-14)

1. **Financial Management: Purchasing a Major Household Appliance**

   Purpose: Describe your decision-making process when you need to replace a major appliance in the home.

   Introduction: Through your work in the Generalized Assessment Phase, you considered cost and quality trade-offs, the importance of identifying reliable retailers, brands and services as well as the benefits and dangers of using credit when making a major purchase. In this competency, you will explore four additional considerations to think about before purchasing a major household appliance.

   Resources: Use the Internet, local retailers, brochures, ads, and trade magazine articles to identify the best appliance for your needs. A visit to various retailers may be considered as an *optional* part of the research process.

   Activity: For the demonstration of this competency, identify an appliance you need to replace and describe your decision-making process along with your final determination of retailer, make, and model. Include information on at least **two** models. Explain how four of the five considerations listed below added to your choice.

   - Warranties – having a warranty can protect the consumer against early defects and delivery damages. Determine what type of warranty is available from the various vendors and which is best for your needs and financial planning. Such warranties might include: 1) lifetime warranty; 2) limited lifetime warranty; 3) extended warranty; and 4) types of warranties available for used, store-bought, and rebuilt appliance models.
   - Evaluation of features offered – Decide which model provides the features most important for your individual needs, eliminating those models with features that are "extras" and tend to be more expensive.
   - Use and care of product – Evaluate the product for efficiency of use, and ease of use and care along with the understanding of the manual and instructions. Identify the delivery and installation costs of the vendor/retailer and the availability of repair services for the appliance in your area.
   - Customer Reviews and consumer reports, noting the comments that helped you make a decision about your appliance choice.
   - Compare the repair cost of the current appliance in the home to purchasing a new or used appliance.
     1) Monthly operating costs (utility bill) in comparison with the purchase price of various makes and models. Based on your comparisons, determine if one make/model will save you more in operating costs over the life of the appliance compared to the others and determine if this savings justifies paying a higher price for that particular make/model.

2) Establish the capacity needed for your use (consider size and fit of the appliance for the space available in the home and the number of occupants) recognizing that it costs more to operate larger sized appliances.

Write a 500-word essay or make a 2-4 minute oral presentation that describes the options you explored in planning to purchase the new appliance. Include in your essay or presentation a summary of the information gathered for the two models in relation to the four considerations chosen from the list above.

Support your conclusions with a graph, chart, table or other graphic representation. The supporting graphic should demonstrate the comparisons between the two models that you researched for this competency.

When a visit to the retailer is made as part of the research, include in your presentation your observations about the product, the questions asked, and information received.

State your final decision of which appliance will be purchased when needed, referring to the specific data and information that led you to this conclusion.

Note: Purchase of an appliance is not necessary for the completion of this competency.

2. **Consumer Advocacy: Avoiding Identity Theft**

Purpose: Discover ways to protect you and your family from identify theft.

Introduction: It can be devastating when someone wrongfully obtains and uses your personal data in some way that involves fraud or deception. If your personal information gets into the wrong hands, others can profit at your expense, both financially and against your reputation. For this competency, you will research various common strategies that criminals use to gain personal data, and ways to protect you and your family from this happening to you.

Resources: Use Internet sources such as www.justice.gov/criminal-fraud/identity-theft/identity-theft-and-identity-fraud to research the types of identity theft listed below and to search for ways to protect yourself and your family.

Activity: Research **three** of the methods commonly used to steal an individual's identity listed below and investigate important steps you can take to protect yourself and your family:

- child identity theft
- tax identity theft
- medical identity theft
- senior identity theft
- social media identity theft

Summarize your research in a 500-word essay or make a 2-4 minute oral presentation.

For each of the chosen areas of research, determine:

- ways that the theft can occur;
- strategies to protect you and your family from the identify theft;
- warning signs that the identity has been stolen; and
- steps you should take once you determine the identity was taken.

Support your conclusions with a graph, chart, table or other graphic representation. The supporting graphic included in the portfolio and presentation may be organized to compare the similarities and differences between the different types of fraud, including protection strategies, warning signs, and steps to take if the identify is stolen.

3. **Consumer Advocacy: Recognizing and Avoiding Common Scams and Fraud**

Purpose: Become knowledgeable about common fraud and scamming schemes and ways to avoid being a victim.

Introduction: Criminals use many methods to gain money and personal information, often by falsely claiming to represent someone you know or a reputable organization. These thieves succeed through the sophisticated use of technology and age-old strategies. Research each of the common scams listed to learn how you could identify when someone is attempting to make you a next target.

Resources: Use online resources such as www.aarp.org/money/scams-fraud/info-12-2013/worst-scam-artists-exposed.html and www.consumer.ftc.gov/scam-alerts to research the topic and look for warning signs of scams and frauds as well as how to avoid being a victim.

Activity: Define **at least four** of the common scams listed below and how to recognize the signs that there is a scam or fraud being proposed. Include in your research steps you can take to protect yourself against them:

- telephone
- charity
- lottery and sweepstakes
- tax-related identity theft
- financial fraud
- ticket scams
- pyramid schemes
- census related fraud

Summarize your research in a 500-word essay or make a 2-4 minute presentation.

For each of the common scams listed above, determine 1) how to recognize the signs that there is a scam or fraud being proposed; 2) the warning signs that a scam has been committed; and, 3) the steps you should take once you determine a scam has occurred.

The supporting graphic included in the portfolio and presentation may be organized to compare the similarities and differences between the different types of scams, including protection strategies, warning signs, and steps to take if someone steals your identity.

4. **Consumer Advocacy**: **Online Security**

Purpose: Research and discover how you can protect your electronic devices and personal data from theft, misuse, and destruction.

Introduction: Become alert to who can see your online information and how to store important information online in a secure way by completing this competency. Research the online security issues listed below and determine how you will protect yourself while engaging in online activities.

Resources: There are a multitude of websites and print materials such as magazines and newspaper articles available on this topic such as www.webpronews.com/5-tips-for-protecting-your-online-presence-2013-07/ and www.consumer.ftc.gov/articles/0272-how-keep-your-personal-information-secure.

Activity: Research and discover how you can protect your electronic devices and personal data from theft, misuse, and destruction for **each of the four** online security issues listed below:

1. Common Internet scams and how to avoid them.
2. Personal information and the electronic devices while online.
3. Signs of phishing emails and vishing calls.
4. How companies and organizations help or hinder your efforts to protect your privacy and personal information by the way they store, use, collect and share your information with others.

Summarize your research in a 500-word essay or make a 2-4 minute presentation. Describe your research, summarize the critical information you discovered as related to the four security issues listed above, and include in your explanation what steps you have taken to protect your personal devices and data. Outline any additional actions you may take to add further protections.

A suggested graphic included in the portfolio might be a flow chart that outlines the various ways of detecting electronic device fraud, how you would fix problems that occurred as a result of the fraud, and the steps you would take to protect yourself from additional attacks.

5. **Financial Planning: Homes and Mortgages**

Purpose: Determine the costs of purchasing a home mortgage by evaluating the various options, costs, and payment schedules.

Introduction: Understanding the costs of purchasing a home or condominium is important when you are saving for the purchase and selecting a home within your budget. Complete the activities listed below to determine which type of mortgage plan would be best for you based on the estimated cost of a prospective home in your area and the payment plan outlined for the mortgage plans.

Resources: Two websites that provide basic information to get you started are: www.homefinder.com/research/saving-for-a-home-63id and money.usnews.com/money/personal-finance/articles/2014/03/12/the-hidden-costs-of-buying-a-home.

Activity: Determine what you will need to qualify for a home mortgage, including money saved toward a down payment, credit score, monthly housing budget, and the local housing market. Explore the following mortgage options, and then compile and examine your findings to make a decision about securing a home mortgage.

Evaluate and describe the **two** best mortgage options to meet your needs, and explain the pros and cons for each. Mortgage options to explore may include the following:

- Conventional Loans such as fixed rate and adjustable rate (ARMs)
- Government-insured Loans such as
  - FHA
  - US Veteran Affairs Home Loans
  - USDA/RHS
- Loans from government controlled corporations
  - Fannie Mae
  - Freddie Mac

Summarize your research in a 500-word essay or make a 2-4 minute presentation. Include in your summary what you will need to qualify for a home mortgage, including money saved toward a down payment, credit score, monthly housing budget, and the local housing market. Then list the pros and cons of the **two** best mortgage options that you researched and what finances you will need to purchase your final choice. Support your conclusions with a graph, chart, table or other graphic representation.

Note: Purchase of a home or property is not necessary for the completion of this competency.

6. **Financial Planning: Purchasing Life Insurance**

Purpose: Determine which type of life insurance policy is best for your family circumstances and select the policy that meets your needs.

Introduction: In an effort to protect your family in the event that something catastrophic would happen to the primary wage earner in the family, research the two types of life insurance listed below and make a decision about which would be the best selection for you and your family.

Resources: A good starting place for information about purchasing life insurance is www.nylaarp.com/Learning-Center/Learn-the-Basics/Life-Insurance-Glossary. Another website for basic information is www.lifehealthpro.com/2013/10/09/5-reasons-clients-buy-life-insurance?page=5. Many life insurance companies provide websites that offer an opportunity to get life insurance quotes.

Activity: Explore the potential need for life insurance by researching term and whole life insurance. Define each type and determine the pros and cons of each relative to your needs and those of your family.

- Identify which type of life insurance is most appropriate for your needs based on your study. Compare the cost and benefits of purchasing the life insurance from **two** companies and make a selection based on the information collected and personal needs.
- Explain how your need for life insurance may change during different life stages.

Summarize your research in a 500-word essay or make a 2-4 minute presentation that explains how you calculated the potential gains projected for each type of insurance. State your final decision citing at least two reasons for your selection and referring to the specific information that led you to the conclusion. Support your conclusions with a graph, chart, table or other graphic representation.

Note: Purchase of a plan is not necessary for the completion of this competency

7. **Financial Planning: Purchasing Healthcare Insurance**

Purpose: Select the healthcare insurance plan that meets your needs.

Introduction: Each of us wants to stay healthy and receive affordable and quality care when we are sick. Choosing an appropriate healthcare insurance plan empowers you to make decisions about your care.

Resources: There are a multitude of websites on the Internet that are hosted by healthcare insurance companies. You are encouraged to visit the state's healthcare information website for options specific to your state.

Activity: Choose between the two options listed below to explore healthcare insurance solutions for you and your family. For the option you chose, examine and analyze *two providers* in your area that can provide the healthcare insurance or health care savings or spending account that will best meet your needs. You might consider your level of health, cost projections, drug coverage, deductibles, co-pays and co-insurance when analyzing the various healthcare options. Choose **one** of the following two options for this competency.

1. Explore the differences between a PPO and an HMO Healthcare plan. Determine the pros and cons of each type of insurance in regard to your needs and availability of services in your area, or from your employer, and those that recognize your current doctor(s) in the health plan network.

2. Research the difference between a healthcare savings account and a flexible spending account and determine if either would be appropriate for your healthcare and financial needs. Two possible references are: https://www.healthcare.gov/glossary/health-savings-account-HSA/ and https://www.healthcare.gov/have-job-based-coverage/flexible-spending-accounts. Determine the pros and cons of both options as they relate to the needs of you and your family.

Summarize your research in a 500-word essay or make a 2-4 minute presentation that explains how you determined the best healthcare insurance plan for you and your family. State your final decision, citing at least two reasons for your selection and referring to the specific information that led you to the final choice in relation to the considerations listed above. Support your conclusions with a graph, chart, table or other graphic representation.

Note: Purchase of a plan is not necessary for the completion of this competency.

8. **Parenting: Childcare and Preschool Options**

Purpose: Choose the most appropriate childcare or preschool option for your child.

Introduction: One of the most important decisions a parent or guardian makes is in the identification of childcare or preschool services that provides for the safety, care and nurturing of the child when the parent cannot be with the child.

Resources: Use the Internet and/or local resources such as brochures, directories, television ads, news segments/documentaries, and newspaper articles to identify providers in your area.

Activity: For the demonstration of this competency option, examine the childcare and preschool options available in your area that meet the individual needs of your child's maturity and education level. Be sure to take into consideration the cost*, location, schedule, and education programs available***.**

Visit at least two providers in your community to help you identify the best option for your child. Determine the differences in quality, cost and education program and/or philosophy.

- Childcare – Observe the child's and adults' interactions to determine if the children look happy and engaged and if adults appear to enjoy their jobs.
- Preschool – In preparation for kindergarten, explore the educational philosophies of the available preschool programs such as play-based versus academic learning (e.g., Montessori or Waldorf). Verify if there is a parent volunteer policy, opportunity, or expectation.
- Additional considerations for exploration include the cleanliness and organization of all spaces (interior and exterior), existence of a play yard or gym and overall safety of the facility. Inquire about the facility's policy on attendance for sick children, if the facility adequately accommodates children with physical/developmental disabilities, and policies for early or late pick-up including any fees that may be involved.

Provide a 500-word essay or 2-4 minute presentation that describes your search for the best program and the significant findings that led you to a first and second choice. Include in your essay or presentation the following:

- the information or services you felt were most critical in relation to the needs of your child and family;
- the services offered by each provider, the address and location in relation to your neighborhood, costs (if available), and sources of information;
- a summary of the visits to providers, such as who you spoke to, the information requested, the questions asked, and information received; and
- state your final decision of which childcare or preschool option you will pursue, referring to the specific information that led you to this conclusion.

Support your conclusions with a graph, chart, table or other graphic representation.

***Note: Enrollment is not necessary for the completion of this competency*.**

***Optional:** determine if your family qualifies for a flexible spending plan or services or tuition assistance through various county/state programs: Division of Rehabilitative Services (DORS), Women, Infant and Children (WIC), or Social Services' Program

9. **Parenting: Educational Issues and Options – School Systems**

Purpose: Identify the school system that best meets the needs of your child.

Introduction: Identifying what school system is best for your child is an important decision that requires exploration before the child reaches school age or when the current enrollment is not a good fit for your child.

Resources: Use the Internet and/or local resources such as brochures, directories, television ads, news segments, and newspaper articles to identify the providers in your area.

Activity: In preparation for this critical decision***,*** explore and visit the available options and providers in your area including: (1) public, (2) charter, and (3) private schools. You might also decide to explore the potential of (4) homeschooling your child (optional).

Examine at least **two** schooling options available in your area that meet the individual needs of the child***.*** List the services offered by each provider, the address and, costs (if any), and sources of information. Issues to consider include the following:

- Local laws about school boundaries and where your child may attend
- Assessment of your child's strengths and challenges and what type of education environment would be best, including the child's special talents that need nurturing
- Available services, if the child has a developmental disorder or physical handicap
- Costs and available financial aid, if any
- Available transportation and after school care
- Discipline policies, homework policies, and teacher-student ratios
- Deadlines for application and enrollment, or if there is a lottery sign-up

If you are considering homeschooling as an option, consider the following issues:

- state homeschooling laws;
- responsibilities that come with homeschooling such as recordkeeping, registration, and reporting requirements; and
- where to find support and resources, including homeschooling groups to join.

Provide a 500-word essay or 2-4 minute presentation that describes your research and key findings that led you to a first and second choice solution. Support your conclusions with a graph, chart, table or other graphic representation. Include in your essay or presentation:

- The information, services, or needs that were most critical in relation to the needs of your child.
- To document a visit to a school include in your portfolio, essay or oral presentation who you spoke to, the information requested, the address and location in relation to your neighborhood, costs (if any),and information received in relation to the issues listed above.
- A summary of the visits to providers, such as who you spoke to, the information requested, the questions asked, and information received.
- State your final decision of which childcare or preschool option you will pursue, referring to the specific information that led you to this conclusion.

***Note: Enrollment is not necessary for the completion of this competency*.**

10. **Parenting: Understanding an Individualized Educational Plan (IEP) and Advocacy for a Special Needs Child**

Purpose: Understand your role and rights in the IEP process and how you can fully engage in the process with your child's school to ensure that the child receives the services to allow the most success in school.

Introduction: A federal law called the Individuals with Disabilities Education Act (IDEA) requires that public schools create an Individualized Educational Plan (IEP) for every child receiving special education services from age three through high school graduation. The IEP process is a way for you, as the parent or guardian, and the school to talk about your child's needs and to create a plan to meet those needs.

Resources: You may choose to use online resources such as those provided by the Center for Parent Information and Resources www.parentcenterhub.org, Understood www.understood.org, or GreatSchools www.greatschools.org to help with your research.

Activity: For this competency:

- research your role, responsibilities, and rights as a parent or guardian in developing your child's IEP;
- explore strategies and recommendations on how to work collaboratively with the school to ensure your child receives the most appropriate services;
- identify and list resources available to you as the parent or guardian that provide information, support, and advocacy; and
- develop a plan on how you will actively participate in the development of the IEP and how you will work with school personnel to implement the plan with the greatest success for your child.

Provide a 500-word essay or 2-4 minute presentation that describes your research and findings that will help you in future meetings to plan and update your child's IEP. Include in your essay or presentation the pertinent information, strategies or resources you feel are most critical in helping you work with the school to provide the education services essential to the success of your child. Support your conclusions with a graph, chart, table or other graphic representation.

Note: If your child does not quality for an IEP but has learning or attention issues or is struggling in school, you may complete this competency by researching your role in the development of a 504 Plan using the same guidelines as listed for the IEP.

11. **Retirement: Financial Considerations**

Purpose: Decide on a tentative retirement date.

Introduction: In preparation for your retirement years, make a decision about when you can afford to retire by researching relevant financial issues based on your personal needs and goals.

Resources: The AARP website www.aarp.org, is an example of a website with many resources that may help with retirement planning and the completion of this competency.

Activity: Draft a plan with various options and costs that meet your personal retirement needs and goals:

- housing options and costs (rent, own, type of housing)
- transportation costs with and without access to a car
- medical insurance options
- income sources: What are my options and how do I choose?
  - IRA, if applicable
  - 401K, if applicable
  - Social Security; calculate the estimated distribution of SS based on your projected age of retirement including spousal benefits, if applicable. You may want to use an online calculator such as one that www.AARP.org provides.

Write a 500-word essay or make a 2-4 minute presentation that describes what your basic needs will be in retirement, the resources used to determine your needs, and relevant information gathered to help you predict when you will be able to retire.

Explain how you calculated expenses and the estimated amount of money needed for retirement. Finally, state your conclusion of a retirement timeline, referring to the specific data and information that led you to this conclusion. Support your conclusions with a graph, chart, table or other graphic representation.

12. **Retirement: Planning for a Healthy and Satisfying Lifestyle**

Purpose: Consider and plan for how you will spend your retirement years and what you will need to fully enjoy life, your family, and good health.

Introduction: We all want to look forward to a healthy and satisfying lifestyle in retirement. Activities and strategies to create new and reinforce existing relationships and social networks can enrich our lives. Also important is engaging in activities that provide mental stimulation and physical fitness. Research the following options, resources, and costs for the activities you would like to pursue in your retirement years.

Resources: Use the Internet and/or local resources such as brochures, directories, television ads or stories, and newspaper articles to identify the local activities, classes, and activities of interest to you. The AARP website www.aarp.org, is an example of a website with resources that may help with this competency.

Activity: For the completion of this competency, investigate at least **two** specific activities, hobbies or part-time jobs you might want to pursue in retirement. Use the Internet and/or local resources such as brochures, directories, television ads or stories, and newspaper articles to identify at least **two** providers for each activity. Research the following issues and compile information on various options available to you.

- Describe the **two** options selected, determine the resources available in your local area, what costs are associated for each, what benefits will be gained, and what cautions should be explored for each of the activities.
- Consider any training needed, costs to participate, approximate time commitment, and the benefits to engage in the desired activities, hobbies, part-time job or business venture.
- In your portfolio:
  - list the services offered by each provider, the address and location in relation to your neighborhood, the hours of operation, cost (if available), and sources of information; and
  - include the person you spoke to, the information requested, the questions asked, and information received. Explain the requirements to engage in the activities at each agency.

Write a 500-word essay or make a 2-4 minute presentation that describes the options you explored in relation to enhancing your health and wellness in retirement.

In your essay or oral presentation, explain why you are interested in each activity and the perceived benefits to your health and wellness. State your final decision of which two activities will be pursued and with which agency, referring to the specific data and information that led you to this conclusion. Support your conclusions with a graph, chart, table or other graphic representation.

Note: Enrollment is not necessary for the completion of this competency

13. **Family Support: Elder Care Issues**

Purpose: Anticipate the resources necessary to care for an older family member or in preparation for your own care.

Introduction: The costs associated with senior housing and assistance options and available local resources and support services are matters that involve some exploration in order to make informed decisions.

Resources: An online calculator such as the one found at www.aplaceformom.com/senior-care-resources/cost-of-care, may be helpful to determine the costs involved with moving to an assisted living community versus staying in the home. Help with choosing an assisted living facility is found at Assisted Living Consumer Alliance assistedlivingconsumers.org and Consumer Consortium on Assisted Living www.ccal.org.

Activity: With the assistance of an online calculator, and based on physical, financial, and everyday life needs, determine which housing option is most appropriate – remain in the home and solicit support services or move to an assisted living community. Include your calculations in the portfolio and explain the rationale for your decision in your presentation. Based on your decision, also complete **one** of the following activities to assist in the planning process:

1. Visit at least two senior housing providers in your community to help you identify the best option. Senior housing options may include board and care homes, residential care facilities, retirement communities, and nursing homes. Determine the differences in quality, cost, and services. Take a tour of the facilities, checking for cleanliness, safety and security procedures, including those available for Alzheimer's and dementia patients. Study the fees and contracts. Observe the staff and how they treat residents. Collect information on staffing ratios, available medical services, and what activities are offered offsite as well as onsite. Determine the differences in quality, cost and services. Include in your portfolio the person you spoke to, the information requested, the questions asked, and information received. State your final decision of which housing option you will pursue, referring to the specific data and information that led you to this conclusion, such as financial considerations and availability of services to meet your family's needs. Organize the information gathered in your portfolio.
2. Identify local resources available for elder care support near you such as access to a Senior Living Advisor, respite care, Hospice and palliative care, and senior nutrition resources. Provide information on at least two of the local services or resources. List the services offered by each of the two providers, the address and location in relation to your neighborhood, costs (if available), and sources of information. Include any pre-requisites to engage the services or access the housing option.

Write a 500-word essay or make a 2-4 minute presentation that describes the options you explored in anticipation of caring for a family member or in preparation for your own care. Include in your essay or presentation what services you felt were most critical in relation to the perceived needs. Support your conclusions with a graph, chart, table or other graphic representation.

14. **Personal Legal Affairs: Legal Documents**

Purpose: Plan for the security and protection of you and your family by acquiring one of the legal documents listed below.

Introduction: No one wants to think about death, but in the event that something catastrophic occurs, it is important to have estate planning documents in place to protect you and your family members.

Resources: There are a number of free online legal forms available on the Internet.

Activity: Research the benefits of the legal documents listed below and the procedures for acquiring each one in your state:

- will
- power of attorney
- health care directive
- guardianship

Complete **<u>one</u>** of the legal documents. Use one of the free online legal forms, complete the form, and include it in the portfolio along with <u>an outline of the steps necessary to make the document a legal one</u>. **It is not necessary for the completion of this competency to legally file the documents or hire attorneys to secure the document.**

In a 500-word essay or a 2-4 minute oral presentation, include the following information:

- Explain why the document is crucial for the security and protection of you and your family.
- Provide at least two reasons that you selected the specific legal document related to your needs.
- Identify the resources available to assist you in your area and include any associated costs.
- Summarize your research and sources of information.

Support your conclusions with a graph, chart, table or other graphic representation.

Note: If you have already secured one of the legal documents listed above, you may submit the signed page as documentation of the completed competency along with a brief essay describing what prompted you to initiate the document and what process you followed to accomplish this task.

Advisors and Assessors will protect the confidentiality of your documentation by ensuring that personal, confidential, and sensitive information is removed before the documents are stored in your file.

