First Portfolio Review by State Trainer

Following NEDP Implementation Training, newly-trained NEDP staff begin working with clients in Generalized Assessment as soon as possible, within 90 days after training. It is recommended that trainees work with only one client in Generalized Assessment until they become fully certified by their State or National Trainer.

The Advisor/Assessor trainee is eligible for certification when the following criteria have been met and verified by the State or National Trainer:

* All NEDP Implementation Training modules and T Trainer requirements are complete,
* The trainee is certified to administer CASAS tests through CASAS Implementation Training,
* The trainee has served at least one client through the Diagnostic Phase,
* The trainee has served one client through the Generalized Assessment Phase,
* The Portfolio Review for trainee’s first Generalized Assessment client is conducted by a State or National Trainer, and
* The State or National Trainer verifies that the first portfolio is satisfactory and recommends that the trainee be certified as an NEDP Advisor/Assessor.

The review of the trainee’s first portfolio is an extension of NEDP Implementation Training. During this review, the trainee’s evaluation skills are honed and inter-rater reliability is built. The trainer reviews NEDP tools that are discussed during the training modules and answers questions about the flow of Generalized Assessment.

During discussions and surveys in the summer and fall of 2016, NEDP State Trainers agreed that certain enhancements to portfolio review would be helpful in providing a nationally consistent support to newly-trained Assessors without creating an undue burden on the State Trainers’ time.

These discussions revealed a need for the first Portfolio Review to include two additions:

* Enhancements to the Portfolio Review itself, and
* At least one technical assistance session, via phone or in person.

**Enhancements to the First Portfolio Review**

In a typical review of a certified Assessor’s portfolio, the reviewer evaluates client work to confirm mastery of all competencies. Although inter-rater reliability is cultivated during these reviews, it is the client’s work — not the Assessor’s work — that is evaluated by the Portfolio Reviewer.

In contrast to a typical in-house review of a certified Assessor, the first Portfolio Review of a newly-trained Assessor by a State or National Trainer is more than a review of the client’s work and a confirmation of client mastery of the competencies. As an extension of NEDP Implementation Training, the first Portfolio Review provides the State or National Trainer with an opportunity to closely examine the trainee’s attempts at evaluating client work and assist the trainee with building strong evaluation habits and use of NEDP tools.

As discussed in training, a Portfolio Reviewer typically evaluates some client responses as “Not Demonstrated”. Both Assessor and client should anticipate that a Portfolio Review will be released with items requiring a reattempt. This is true not only of the first Portfolio Review, but by subsequent in-house reviews of portfolios by certified Assessors as well.

Enhancements included in this first Portfolio Review:

* Requesting that trainees document any difficulty in interpreting evaluation criteria or evaluating client work in the “notes to staff” field so that these issues can be discussed,
* Spot-checking some previous client attempts that were evaluated as “Not Demonstrated” by the trainee in order to ensure that
  + The evaluation criteria is followed and that the client response did not demonstrate mastery, and
  + Any feedback given to clients in the “notes to clients” field is appropriate, useful, but not instructional in nature,
* Verifying that the oral In-Office Check questions are always recorded and taken verbatim from the NEDP item,
* Modeling the mediation and consensus processes, and
* Providing feedback to the Assessor-in-Training through the “notes to staff” field.

**Technical Assistance Session(s)**

It is vital that a strong line of communication is developed and maintained between the trainee and the state trainer during the trainee’s first portfolio. Informal, frequent communication is encouraged via phone, email, and/or the “notes to staff” field.

In addition to these notes, at least one technical assistance session should also be conducted between the State Trainer and trainee, usually when the first competency area has been reviewed by the trainer and is ready to be released to the client.

This technical assistance session is held over the phone, via webinar, or in person. Topics of discussion include the reviewer’s findings and an opportunity for the trainee to ask questions, as well as

* Items for mediation
* Generalized Assessment Flow (opening area/ IOCs/ evaluation/ feedback/ PTA)
* IOC Notes tab
* Sessions drop-down list
* NEDP Reports
* Guidelines on “notes to client” and feedback session.

**Evaluating Advisor Work**

To become a certified Advisor/Assessor, a trainee must also serve one client through completion of all instruments in the Diagnostic Phase. Since the first Portfolio Review focuses on Assessor work, the Trainer must rely on the administrator at the trainee’s site to verify that the trainee has served a client through the Diagnostic Phase in compliance with NEDP policy.

**Additional Options for First Portfolio Review**

Some states and localities offer additional support for new trainees, including but not limited to follow-up conference calls or meetings with part or all of the training cohort, site visits, professional learning communities (PLCs), evaluation workshops, and refresher trainings. CASAS/NEDP encourages states and localities to continue to support newly-trained NEDP staff in an approach that fits their needs. These additional options do not replace enhancements to Portfolio Review or the technical assistance session, which are minimum expectations that all state trainers should fulfill with each NEDP trainee.

**Timeline for Implementation of Enhancements to First Portfolio Review**

* Trainers who have already begun a trainee’s first Portfolio Review will begin incorporating enhancements to Portfolio Review with the next competency area submitted for review. It is not required to retroactively apply enhancements to the areas that have already been found “demonstrated/confirmed”.
* Trainers who have not yet begun first Portfolio Review with a trainee should begin the enhancements to the first Portfolio Review when the first competency area is submitted for review.