

**Nevada Rehabilitation Division
Process and Forms for Counselor Evaluations--July 2017**

Seven job elements are included on the Work Performance Standards. The rating for Job Elements: #1, #2, #3 and #5 are tied to the agency's case review instrument. Job Element #4 (Employment Outcomes) is based on the number of successful employment outcomes. This number was lowered from 28 successful outcomes under the old performance standards in order to encourage quality, but also maintain some standard for achieving employment outcomes. Job Elements #6 and #7 (Customer Service and Safety) are mandatory departmental required elements

Instruments Involved in Determining Ratings for Counselor Evaluations:

1. The Work Performance Standards
2. The Case Review Instrument
3. The Case Review Tabulation Form (Excel Spreadsheet)

To Rate Job Elements: #1, #2, #3 and #5:

The supervisor utilizes **the case review instrument** to complete 10 case reviews per counselor per evaluation year.

After each case is reviewed, the supervisor enters the rating he or she gave for each question answered (1, 2, 3 or NA) onto **the case review tabulation form** following the procedures listed on "Instructions for Case Review Tabulation Form" below.

After all 10 cases are reviewed; the tabulation form will calculate a "score" for each job element based on the "numerical value" of each case review question answered for each element. The Work Performance Standards indicate the range within, which the "score" must fall in order for the counselor to meet or exceed standards in each job element. These scores are based on 95% compliance to exceed standards and 85% compliance to meet standards. (The highest rating attainable is a "3".

3 x .85 = 2.55 to meet standards; 3 x .95 = 2.85 to exceed standards).

At first glance the process may appear complicated, but in practice it is simple for the supervisors to use, and minimizes some of the subjectiveness when trying to decide whether to give a meet, exceed or does not meet standards rating. (NV VR has been utilizing a case review tabulation form tied to the case review instrument for a number of years. The most complicated aspect seems to be updating the excel spreadsheet when the case review instrument is revised).

In addition to calculating a "score" used for evaluation purposes, the tabulation tool also assists the supervisor to identify patterns and challenges in a specific area. For example, a counselor may receive an overall score that results in a "meet standards" rating in Job Element #5: Understanding, Applying, and Documenting Compliance with Regulations, Laws and Policies. However, a quick look at the tabulation form may show that the counselor received a "1" on question #24 (Eligibility Time Line) in five out of ten cases reviewed. Thus the supervisor becomes aware that coaching is needed in this area.

The tabulation form is also used to improve inter-rater agreement among supervisors and the QA Team. Twice a year supervisors and the QA team review 1 or 2 identical “test cases” during the district and state wide case reviews. Each reviewer’s answers to the review questions are entered on the tabulation form, which is shared with all the raters. The QA team facilitates a meeting with supervisors to discuss differences in answers to specific review questions when there is a large discrepancy in reviewer responses. This discussion promotes discussion regarding each reviewer’s interpretation of a question. When differences in interpretation are prominent, agreements can be made regarding the intent of the question, and/or the question may be re-worded to provide additional clarification as to its intent.

Attached are:

- An uncompleted tabulation form; and
- A copy of a completed form demonstrating one scenario of a meet standards rating.

Note in this scenario each job element received a score of 2.55 which will result in a “meets standards” in these elements on the counselor’s evaluation.

This scenario demonstrates the number of questions given a rating of “2” (mostly compliant, with one or more major omissions, any omissions have no more than a moderate impact) **compared to** the number of questions given a rating of “3” (compliant, any omissions are minor and have no or only mild impact) resulting in a score of 2.55.

Instructions for Case Review Tabulation Form:

Use a separate spreadsheet for each counselor you supervise.

For each case reviewed, enter the Case ID # on Row 12 (beginning in Column F). Then, going down the column, enter the rating for each question from the Review Instrument for that case. If you enter an invalid response, you’ll get an “error message.” Averages are calculated below each section with all “NA” responses being disregarded. The number of questions rated appears below the average. **Note:** In order for the data validation feature to work correctly, entries must be typed directly into the cell. Please **do not use “copy and paste”** or “click and drag” to enter scores.

Yellow cells indicate missing information or where data has not yet been entered. After completing a column in any section, check to make sure there are no yellow cells remaining. **A yellow cell will automatically calculate as “zero” and the average which appears below will not be correct.**

Once you have filled in all the scores for a particular case, go up to the Summary Table in the upper left corner and update the total number of cases reviewed for each section (column D). **Note: the cumulative average score, which appears in green, will not be correct until you have updated the number of cases reviewed for that section.**