

Maryland State Department of Education  
**Division of Rehabilitation Services**  
**Individual Performance Plan for**  
**VR Specialist I/II & VR Technical Specialist**

Program Year: \_\_\_\_\_ (July 1 – June 30)

Name: \_\_\_\_\_ Position Classification: \_\_\_\_\_

1. Effectively manage assigned caseload(s) and provide timely services to consumers/students.
2. Complete Individualized Plans for Employment within 90 days of eligibility determination, unless the record of services indicates that there is an agreement with the consumer for an extension of the time frame.

**Goal = 100%**

3. Provide quality vocational guidance and counseling to consumers.
4. Achieve and document Successful Competitive Integrated Employment Outcomes in accordance with policy.

**Goal = \_\_\_\_\_**

5. Collaborate with and refer to WIOA partner programs, effectively coordinate with high schools (transitioning youth [TY] counselors), participate in IEP meetings (TY counselors), coordinate with DORS Business Relations Branch Business Services Representatives and document appropriately in an AWARE™ "Collaboration" case note.
6. Enter consumer Measurable Skills Gains/Credential Attainment and appropriate verification documentation of Educational Goals and Measurable Skills Gains in AWARE™ in a timely manner.
7. **Technical Specialist Only:** Demonstrate leadership and technical assistance through community outreach and DORS special projects.

\_\_\_\_\_  
Employee Signature/Date

\_\_\_\_\_  
Supervisor Signature/Date

\_\_\_\_\_  
Program Manager Signature/Date

Maryland State Department of Education  
**Division of Rehabilitation Services**  
**PEP Scoring Formulas for**  
**VR Specialist I/II & VR Technical Specialist**

Supervisors are required to maintain a paper or electronic PEP folder for each of their staff. The folder should include notes related to performance, kudos, training, and (for VR Technical Specialists only) delegated authority reviews.

All staff are strongly encouraged to track their own performance throughout the PEP period using the measures described below. Staff may also complete a PEP Self-Assessment (see InDORS).

### **PEP Periods and Report Dates:**

#### **Winter PEP (November/December):**

- Mid-cycle Report Dates: June 1<sup>st</sup> – November 30<sup>th</sup> of current year
- End-cycle Report Dates: December 1<sup>st</sup> of previous year – November 30<sup>th</sup> of current year

#### **Summer PEP (May/June):**

- Mid-cycle Report Dates: December 1<sup>st</sup> of previous year – May 31<sup>st</sup> of current year
- End-cycle Report Dates: June 1<sup>st</sup> of previous year – May 31<sup>st</sup> of current year

### **PEP Ratings:**

#### **1. Effectively manage assigned caseload(s) and provide timely services to consumers/students.**

To rate this measure, supervisor will use the **(PEP) Caseload-Open Random Sample** Layout in the AWARE™ Participant Module to select at least five VR cases for detailed review to evaluate the following for the PEP period (sort report by Caseload Assignment):

- Activity Due Report is utilized effectively.
- Authorizations reflect a variety of vocational rehabilitation services.
- The counselor consistently and accurately follows DORS policy.
- The counselor appropriately authorizes benefits counseling.
- There is regular communication with the consumer without any unexplained gaps.
- The counselor regularly promotes training to advance the consumer's career.
- Reports are reviewed, acted on, and discussed with consumers, as appropriate, in a timely manner.
- Services are implemented according to IPE timelines.

#### **Reports to Reference:**

- AWARE™ Participant Module Layout: (PEP) Caseload-Open Random Sample Layout
- Activity Due Report [AWARE™ Reports Module]
- AWARE™ Financial Module Layout: Authorizations-Full w/Counselor Information
- Case Notes Due Report [AWARE™ Reports Module]
- Expenditures by Service Category Detail Report [AWARE™ Reports Module]
- Benefits Planning Report for Service-E and Employed [Social Security Programs]

#### PEP Rating Guide:

- **Outstanding** = Counselor meets Satisfactory Performance AND the case record indicates the counselor's comprehensive understanding of the consumers' needs, use of reports, and monitoring of planned services.
- **Satisfactory** = Reports and case reviews reflect counselor is maintaining effective communication with consumers and IPE services are implemented in a timely manner.
- **Unsatisfactory** = Case records indicate delays in services and a failure to adequately communicate and address consumers' needs.

### 2. **Complete Individualized Plans for Employment within 90 days of eligibility, unless the record of services indicates that there is an agreement with the consumer for an extension of the time frame.**

#### Reports to Reference:

- VR Plan Development Timeliness for PEP period [AWARE™ Reports Module]

#### Calculation:

- Number of timely IPEs completed, divided by the total number of IPEs completed.

#### PEP Rating Guide:

- **Outstanding** = 100%
- **Satisfactory** = 95% – 99%
- **Unsatisfactory** = below 95%

### 3. **Provide quality vocational guidance and counseling to consumers.**

Counselor will effectively use the VR Plan Development Checklist which is completed in partnership with each consumer.

Using the **(PEP) Caseload-Open Random Sample** Layout in AWARE™, select at least five **VR cases** for detailed review of the consumer's VR Plan Needs Assessment Checklist, the IPE, case notes, and authorizations to determine whether or not quality vocational guidance and counseling was provided and services were implemented in accordance with the IPE.

- The **VR Plan Needs Assessment Checklist** is completed and addresses the consumer's strengths, resources, priorities, concerns, abilities, capabilities, and interests.
- The employment goal matches the consumers strengths, abilities, interests, and capabilities.
- There is evidence that the counselor discussed the job market in the consumer's geographic area and assisted with career exploration.
- There is evidence of consideration of training opportunities related to career pathways.
- Services needed to support achievement of the employment goal are included on the IPE and provided in a timely manner (e.g., transportation, childcare, personal assistant, readers, foreign language and ASL interpreters).

- Consideration is given to employment opportunities for the consumer to “earn while they learn” to support themselves while participating in a vocational or educational training program.

#### PEP Rating Guide:

- **Outstanding** = Counselor meets Satisfactory Performance AND the case record demonstrates the counselor regularly utilizes and shares tools and information related to career exploration, job market, employment goal minimum requirements, and use of comparable benefits and resources.
- **Satisfactory** = The VR Plan Development Checklist is routinely utilized and thoroughly completed, and the case record demonstrates discussion of disability-related factors, the local job market, and support services.
- **Unsatisfactory** = Case records indicate a lack of guidance provided to the consumer, resulting in insufficient support and an IPE that does not meet the consumer’s strengths, resources, priorities, concerns, abilities, capabilities, and interests.

#### 4. **Achieve and document Successful Competitive Integrated Employment Outcomes in accordance with policy.** (Refer to AWARE™ or regional director for employee’s annual goal.)

#### Reports to Reference:

- Use the Staff Performance Report for the PEP period (see specific instructions on the PEP Rating Worksheet and Instructions).

#### PEP Rating Guide:

- **Outstanding** = 101% and above of assigned CIE Outcomes goal.
- **Satisfactory** = 90% – 100% of assigned CIE Outcomes goal.
- **Unsatisfactory** = Less than 90% of assigned CIE Outcomes goal.

#### 5. **Collaborate with and refer to WIOA partner programs, effectively coordinate with high schools (TY counselors), participate in IEP meetings (TY counselors), and coordinate with DORS Business Relations Branch Business Services Representatives and document appropriately in an AWARE™ “Collaboration” case note.**

From the Participant Module in AWARE™ use the **(PEP) Case Note Collaboration** Layout (sort by Case Note Author) to find all collaboration case notes, then randomly select at least 5 cases for review for quality content.

#### PEP Rating Guide:

- **Outstanding:** Counselor meets Satisfactory performance AND the counselor participates in district, regional, or statewide projects and initiatives to expand collaboration and to improve resource sharing among partners.
- **Satisfactory:** Counselor is demonstrating and documenting effective collaboration appropriate to their assigned caseload(s).
- **Unsatisfactory:** Counselor has documented very few collaboration case notes or efforts appropriate to their assigned caseload(s).

5. Enter consumer Measurable Skills Gains/Credential Attainment and appropriate verification documentation of Educational Goals and Measurable Skills Gains in AWARE™ in a timely manner.

**Note:** If an educational goal is verified, this results in a Measurable Skills Gain (MSG).

**Part One:**

Using the **(PEP) Educational Goal** Layout for each counselor's VR caseload (not PET case type):

- Enter the **Educational Goal Expected End Date**, as follows:
  - For Mid-Cycle PEPs: Use either April 1<sup>st</sup> – November 30<sup>th</sup> or October 1<sup>st</sup> – May 31<sup>st</sup> (eight months).
  - For End-Cycle PEPs: Use either April 1<sup>st</sup> – May 31<sup>st</sup> or October 1<sup>st</sup> – November 30<sup>th</sup> end date of the PEP period (14 months).
- To calculate the percentage of MSGs:
  - Add the number of Verified Educational Goal Outcomes (must say "VERIFIED") plus Earned Special Education Certificates, divided by the total number of Educational Goals with Expected End Dates (Total is shown at the top of the search results page).

**NOTE:** Earned Special Education Certificates are NOT considered MSGs for federal reporting purposes; however, credit will be given to staff who enter them for this PEP measurement.

**Part Two:**

From the Financial Module in AWARE™, use the **(PEP) College/Training** Layout to find all authorizations issued for College and University Training and Vocational and Occupational Skills Training for the same period used above for the Educational Goal Expected End Date. Compare the authorizations issued to the educational goals from Part One for this period to ensure that all authorizations have a corresponding educational goal.

PEP Rating Guide:

- **Outstanding =**
  - 50% of all the Educational Goals that have an expected end date that falls during the PEP period have an Education Goal Outcome entered in AWARE™ as "**VERIFIED**" and documentation of successful completion is in the case record,
  - **AND** all selected consumers enrolled in college or vocational training have an active or Verified Completed educational goal.
- **Satisfactory =**
  - 35% to 49% of all the Educational Goals that have an expected end date that falls during the PEP period have an Education Goal Outcome entered in AWARE as "**VERIFIED**" and documentation of successful completion is in the case record,
  - **AND** all selected consumers enrolled in college or vocational training have an active or Verified Completed educational goal.

- **Unsatisfactory =**

- Less than 35% of all the Educational Goals that have an expected end date that falls during the PEP period have an Education Goal Outcome entered in AWARE™ as “**VERIFIED**” and documentation of successful completion is in the case record,
- **AND/OR** educational goals are not completed for selected consumers enrolled in college or vocational training.

**6. Technical Specialty leadership, community outreach, and special projects measurement,** when applicable (rate for VR Technical Specialists only).