



# BDA Clinical Associate Scorecard

Welcome to the Clinical Associate Scorecard! This tool was created to provide Clinical Associates in the company a:

1. List of key performance indicators for the clinical associate role: Each area of the scorecard provides key indicators that will help you become an excellent clinical associate in the company.
2. Guideline for weekly mentor conversations: Using the scorecard can help guide your weekly mentor conversations and check-ins. Areas such as learner progress, professional development, and timeliness amongst other areas can be reviewed.
3. Guide to evaluate and self monitor performance and create goals for pay increases: The scorecard can be used to create goals for yourself in order to establish criteria for pay increases. You can discuss this with your BC, mentor, and ultimately a member of the executive team for final review and monitoring.
4. Reference point to review examples of excellent performance: The scorecard can be used as a reference point to see what excellent performance looks like within any particular area. There will be multiple examples in each category, and the list will grow regularly.
5. Link to our skills matrix to find areas of interest, experts, and others with similar interests: Section 2 of the scorecard has a link to our skills matrix where you can review various areas of interests and expertise within BDA. You can reach out to an expert or simply reach out to others in the company who may have a similar interest. This may lead to study groups, professional development opportunities, or simply getting to know others within the company.
6. Format to request and receive feedback from your mentor, CC, or BC on your case(s). The scorecard can be used to request and receive feedback from your CC/BC on your current performance in a given area. This can help you create new professional development opportunities, fine tune your skills, or establish baseline for new areas of growth.

# Section I: CA Scorecard

<b>CA SCORECARD CHECKLIST</b>	
Rating Scale: 1 Very Poorly - 2 Poorly - 3 Average - 4 Well - 5 Excellently	
e.g. "If I submit my timesheet every week by the deadline and have never missed one, I would rate my performance at a 5." "If I miss a submission or make an error every 2 months or so, I would rate my performance at a 3 or 4"	

	FOCUS AREA	GOALS	My Rating	Interrater
1	LEARNER PROGRESS	<ul style="list-style-type: none"> <li>● Achieve at least 80% treatment integrity when collected by CA/BC.</li> <li>● Take accurate data collection as per BC/CC</li> <li>● Use home program binder including quick reference guide and other materials.</li> <li>● Review of learner graphs &amp; data with BC/CC.</li> <li>● Attend team meetings (when possible / requested)</li> <li>● Assist learner with moving to less restrictive situation.</li> <li>● If learner is not making progress in an area, bring to attention of CC and BC</li> <li>● Let CC/BC know of any needed materials</li> <li>● Share ideas with BC/CC that may benefit the learner</li> </ul>		
2.	ENGAGEMENT	<ul style="list-style-type: none"> <li>● Actively engage with learner during session Create definition of "engaged" with BC and/or CC (i.e. not on phone, % of intervals running goals)</li> </ul>		
3.	TIMESHEETS	<ul style="list-style-type: none"> <li>● Submit timesheet with all associated notes with 100% compliance every Saturday by midnight.</li> <li>● Provide detailed notes including but not limited to behavior data <u>%</u>, goals completed, community outing location.</li> </ul>		

CA's Name: \_\_\_\_\_ Mentor: \_\_\_\_\_ Interrater: \_\_\_\_\_ Date Completed: \_\_\_\_\_

	FOCUS AREA	GOALS	My Rating	Interrater
	TELEHEALTH	<ul style="list-style-type: none"> <li>● Actively use telehealth video consultation platform with learner (with BC/CC/parent ok)</li> <li>● Use telehealth platform for team meetings or interest groups.</li> <li>● Ensure phones and Bluetooth devices are charged and ready for telehealth or bring back up battery</li> <li>● Work with BC to get clear audio and pictures</li> </ul>		
4.	GRAPHS	<ul style="list-style-type: none"> <li>● Review learner's graphs at least once monthly</li> </ul>		
5.	WEEKLY SURVEYS	<ul style="list-style-type: none"> <li>● Complete weekly google survey by Saturday at 11:59pm</li> </ul>		
6.	CALLOUTS	<ul style="list-style-type: none"> <li>● Use call out line for all cancellations (staff or client).</li> </ul>		
7.	TIME MANAGEMENT	<ul style="list-style-type: none"> <li>● Arrive to cases on time (or early)</li> <li>● Submit requested information (i.e. data) to BC/CC</li> <li>● Respond to company emails/constant contacts by requested time frame.</li> <li>● Manage caseload to meet needs of all learners but also formulate a schedule that is feasible for yourself</li> <li>● Plan in advance for days off from school or family vacations (i.e. save money, ask for more work weeks in advance, etc)</li> <li>● Provide reasonable notice to Joe Carter if need to fade off a case</li> </ul>		
8.	SOCIAL MEDIA	<ul style="list-style-type: none"> <li>● Post and/or comment regularly on LinkedIn or other BDA platforms.</li> <li>● Seek to create content for BDA social media platforms.</li> <li>● Share BDA content on social media (i.e. LinkedIn)</li> <li>● Check BDA culture page for important company updates.</li> </ul>		

CA's Name: \_\_\_\_\_ Mentor: \_\_\_\_\_ Interrater: \_\_\_\_\_ Date Completed: \_\_\_\_\_

	FOCUS AREA	GOALS	My Rating	Interrater
9.	PROFESSIONAL DEVELOPMENT	<ul style="list-style-type: none"> <li>● Complete degree or certification</li> <li>● Complete RBT coursework and pass exam</li> <li>● Attend workshops &amp; conferences</li> <li>● Join Delta (prior approval needed)</li> <li>● Attend leadership meetings (if approved)</li> <li>● Watch internal trainings on our Skyprep platform (contact Kellie Smith)</li> <li>● Listen to ABA podcasts (i.e. ABA inside track, Behavioral Observations Podcast).</li> <li>● Actively participate in group discussions or presentations.</li> <li>● Disseminate behavioral science across multiple disciplines</li> <li>● Create behavior analytic content via video and audio per approval</li> </ul>		
10	MENTORSHIP	<ul style="list-style-type: none"> <li>● Provide mentorship to new staff members (if approved by Joe Carter).</li> <li>● Have weekly contact with mentor by phone, in person, or text/email. Call you mentor if they do not call you.</li> <li>● Provide feedback about mentorship on weekly survey</li> <li>● Be a resource for mentees about cases, company questions, issues with timesheet, etc.</li> </ul>		
11	STAKEHOLDER SURVEYS	<ul style="list-style-type: none"> <li>● Receive predominantly good to excellent scores on stakeholder (parent/ school) surveys</li> <li>● List score and feedback here of one of your surveys: Date: _____ Score: _____ Feedback Given: _____ _____</li> </ul>		

CA's Name: \_\_\_\_\_ Mentor: \_\_\_\_\_ Interrater: \_\_\_\_\_ Date Completed: \_\_\_\_\_

	FOCUS AREA	GOALS	My Rating	Interrater
12	CULTURE/TEAMWORK	<ul style="list-style-type: none"> <li>● Be able to explain our services to others to fulfill needs for the client.</li> <li>● Create opportunities for other employees.</li> <li>● Share feedback about fellow employees via weekly surveys or emails or BDA culture.</li> <li>● Assist co-workers on case via in person or remote consultation</li> </ul>		
13	FEEDBACK	<ul style="list-style-type: none"> <li>● Accept feedback from CC's, BC's or any executives with a positive attitude</li> <li>● Request feedback if it would be helpful to you and the learner</li> <li>● Follow through with any advice/feedback that was given</li> </ul>		
14	SOCIAL/LIMO OUTINGS	<ul style="list-style-type: none"> <li>● Ensure learners are signed up at least 24 hours in advance of the outing</li> <li>● Check in with the on-site supervisor upon arrival</li> <li>● Maintain Level of Supervision listed on LOS badge</li> <li>● Find someone to watch learner and pass off LOS badge if need to step away for a moment</li> <li>● Complete Google Form at the end of outing</li> <li>● Remain engaged with learner throughout entire outing</li> </ul>		
15	ETHICS	<ul style="list-style-type: none"> <li>● Do not offer advice to stakeholders (parents/teachers/etc.) that has not been run by the BC on the case</li> <li>● Do not accept gifts</li> <li>● Maintain boundaries with parents of learners including on social media or attending after school events. Do not post pictures/videos of learners on personal pages.</li> <li>● Request training on any topic you are asked to implement that is not in your current scope or sequence</li> </ul>		
<b>Average Score:</b>			_____	_____

## **Section 2: Link to BDA Skills matrix**

FOR ACCESS TO OUR SKILL MATRIX, CLICK ON THE LINK BELOW. THE MATRIX LISTS CONSULTANTS IN OUR COMPANY WITH SPECIALTY AND INTERESTS AREAS. PLEASE FEEL FREE TO CONTACT CONSULTANTS WITH A SIMILAR AREA OF INTEREST FOR QUESTIONS, PROFESSIONAL DEVELOPMENT, OR TO BEGIN AN INTEREST GROUP.

<https://docs.google.com/spreadsheets/d/1E2Wyts1MHmfoSdvYuF3idpgkFtxe0XzRgqZfn eJ3q2Y/edit#gid=0>

## **Section 3: Examples of Excellent Performance**

Scorecard examples of excellent performance from weekly survey:

Clinical Associate
“CA continues to always be thinking about treatment programs to positively influence our learner. A visual analysis of graphs demonstrates that the client engages in much less problem behavior at work when CA is there working with him versus when he is working by himself (client is tracked on usual terms with CA collecting data but also is tracked for an hour after work when staff "leave" to demonstrate difference between when staff prompt and when they do not). CA had driven the client to work in snow storms last year, worked with him outside when the temperature was below 20 degrees this year, and continues to make drastic improvement with the client.”

CA's Name: \_\_\_\_\_ Mentor: \_\_\_\_\_ Interrater: \_\_\_\_\_ Date Completed: \_\_\_\_\_

CA has demonstrated professionalism and growth in this past week and a half. She experienced a crash course in dealing with a difficult parent and unique situations and was still able to remain positive, professional, and follow protocols throughout the process. Her communication with myself and the interim BC was imperative to both her and the client's success over this winter break. She also picked up many hours outside of her usual schedule to assist in cancellation and keep the client and parent happy. I look forward to seeing her grow within this company and am proud to be her mentor.”

CA is punctual and is always very professional. Since schools were closed this week, she offered and provided an additional session to our client this week. I really appreciated that she did that, and I know that the family did, as well.”

CA has a difficult family to build rapport while maintaining professional boundaries and I am always impressed by his client focus while attending to parents attention seeking needs.”

CA continues to be professional, punctual, and ambitious in his role as a CA and a mentee in regular meetings. Stakeholders report that CA's work is excellent in schools and homes. He is completing coursework in pursuit of board certification and comes to mentorship meetings prepared to have constructive conversations about the science and applications to his clinical practice. CA's continued professionalism is greatly appreciated

CA has been a great addition to the company. Her ability to navigate conversations with parents has proven very valuable and her suggestions for the case are right in point. Her ability to operate independently has also proven to be a huge help!”

CA continues to think outside the box with her clients. She always brings her best to each session. Her diligence is apparent! CA's consistency implementing goals in the home and community benefits both the client and the family. CA is patient and thorough; she remembers the short term and long term goals, as well as the barriers within the family environment and patiently works towards them. She maintains communication with our team and is a true asset.

I do not work directly with CA in Haddonfield; however, whenever I see him, he is always full of positive energy, greets everyone with a smile, and engaging with his students. This week I was observing a student during recess, and CA was able to provide me with information regarding this student's peer interactions and areas of weakness for this school year and last year. This is a student that CA does not work directly with but is familiar with due overlapping at lunch and recess. On Thursday, CA recognized that the student was spending a lot of time alone at recess and encouraged the student to come play soccer with him and some other peers. Again

CA's Name: \_\_\_\_\_ Mentor: \_\_\_\_\_ Interrater: \_\_\_\_\_ Date Completed: \_\_\_\_\_

this is not a student that CA works directly with, but he took the initiative to get him more engaged (while also keeping adequate supervision of the student he works with). I am always impressed with CA's level of enthusiasm and dedication to all the students in the school - He is always keeping an eye out for students who may need a little extra support, trying to include as many students as he can, and gets everyone engaged. I really appreciate his hard work. If I could give a bonus to someone this week, it would be him as he continually goes above and beyond! “

I really appreciate how CA always sends me her notes and data well in advance of the Saturday deadline, which I need in order to finalize all of my work on our case that we share. This week, our Regional BC emailed all of us on the case on Thursday and asked for our notes/data from this week so that she could incorporate them into the learner's BSP update report. CA sent it immediately, which was a huge help to both. Her work is neat, complete, and professional.

CA goes above and beyond to make sure his learner is staffed and able to go on all outings his parents sign him up to attend. CA has even featured his learner in BDA videos and consistently shows the improvement of his learner through his hard work with home programming and outings.”

CA's have done a wonderful job of coming together as a team to support their shared learner. They have consistently been communicating through our group text message chain to share what has been working and what can be improved. They're communication with one another is a reason why their learner is excelling.

CA works so well with learner. He maintains a casual yet firm demeanor which the learner responds to in a positive way.

Working with CA in district has been a pleasure. She is simultaneously professional, punctual, engaging with her learner, and helpful to staff and those learners requiring it. CA consistently sets a positive example to all those who surround her through her words and actions. She is clearly and unequivocally a valuable member of BDA.

CA submits time sheet and other important paperwork on time.

CA is always positive and upbeat when working with Learners. She always greets and engages with every learner. CA is a good role model for other CA's when on BDA Outings.



CA's Name: \_\_\_\_\_ Mentor: \_\_\_\_\_ Interrater: \_\_\_\_\_ Date Completed: \_\_\_\_\_

*List any excellent feedback you have received here:*

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## **SECTION 4 MENTOR/MENTEE DISCUSSION QUESTIONS/POINTS**

- **WHO ARE YOUR MENTORS?**
- **DO YOU HAVE ENOUGH HOURS?**
- **ANY RECURRING ISSUES WE CAN ADDRESS VIA OUR SURVEY?**
- **DO YOU KNOW WHO TO CONTACT FOR SKYPREP TRAININGS?**
- **DO YOU KNOW WHO TO CONTACT FOR RELIAS & RBT?**
- **DO YOU KNOW HOW TO GET A RECRUITMENT BONUS?**
- **DO YOU KNOW HOW TO RECEIVE 5%?**
- **WHAT ARE YOUR LONG TERM GOALS WITH BDA?**
- **ARE YOU AWARE OF WHAT MOVEMENT MATTERS IS?**
- **DO YOU KNOW WHY WE DISSEMINATE VIA SOCIAL MEDIA?**
- **DO YOU KNOW ABOUT OUR DELTA ONE PROGRAM?**
- **DO YOU KNOW WHO TO CONTACT TO START A SOCIAL SKILLS COMMUNITY GROUP?**
- **DO YOU KNOW HOW TO GET MOST "BUY IN" FOR YOUR BEHAVIOR PLANS?**