Welcome to RRCEP II’s New Technical Assistance Brief

RRCEP II is introducing a new publication to inform our region of strategies that address the current vocational rehabilitation issues observed when Technical Assistance is provided. The Briefs will offer an overview of the TA and the recommendations and references that were generated from the consultants and agency staff. The TA Brief will be sent to our constituents on a periodic basis and will also be available on our website. We hope that the information disseminated will serve as a roadmap for agencies to consider if they are encountering similar issues.

Situational Assessment: The Art of Designing a New Vocational Service Component

Background

The use of situational assessment has been growing as a primary means of evaluating the vocational potential of consumers. There are many advantages to using community-based assessment, including reduced assessment costs, the ability to observe consumers in real work settings, increased consumer exposure to jobs, and expanded relationships with employers. Consumers report that situational assessments offer improved vocational self-awareness which has a positive impact on their ability to make career choices (Scroggin, Kosciulek, Sweiven, & Enright, 1999). Increasingly, situational assessment has become the evaluation method of choice for both provider and consumer (Hursh, Rogers, & Anthony, 1988; Murray, 1990)

One agency in the southern tier of New York State applied for a technical assistance grant that would provide support for the addition of a situational assessment component to their list of services. Their hope was to develop new vocational evaluation and career planning options for their consumers. The agency has a 15-year history of providing person-centered vocational planning, direct placement and supported employment services to individuals with developmental and learning disabilities. With the agency being relatively new to the area of vocational evaluation, the thought of adding a formal situational assessment module to their list of services was quite daunting. The requested technical assistance described a need for a program marketing concept, policies and procedures, evaluation instruments, forms, marketing materials, and a report format.
The Technical Assistance Process

A consultant was assigned to the project and met with the agency staff to determine the most appropriate course of action. The following steps were taken in accordance with the recommendations of the consultant:

I. Review of the Literature: Basic materials on evaluation and situational assessment for transition and supported employment were provided, including *Functional Assessment in Transition and Rehabilitation for Adolescents and Adults with Learning Disorders* edited by M. Bullis and C. Davis. Additionally, several examples of other providers’ forms (i.e., functional assessment and on-the-job observation instruments) were compared with the agency’s existing assessments.

II. Identification of Possible Instruments: Three methods were used to determine which instruments would be best suited for a situational assessment package that best meets the agencies goals:

1) Attendance at formal vocational evaluation trainings. Staff participated in two RRCEP trainings, *Vocational Assessment Tools* and *Functional and Situational Assessment*.

2) Consultant recommended assessment tools. Several commercial instruments were suggested to supplement the data gathered by the situational assessment. Those selected to gather career interest data were the *Career Scope Interest Inventory*, the *Career Occupational Preference System-II* (COPS-II), and the *Career Occupational Preference System Pictorial* (COPS-PIC). The *Center for Innovative Teaching Experiences* (CITE) *Learning Styles Survey* is a free, learning style survey that was slightly modified for application with adults. The *Adult Basic Learning Exam* (ABLE) will be used to assess reading and language skills and mathematical styles which will be particularly useful for GED preparation. The last tool that was chosen is the *Becker Work Adjustment Profile*, a structured, observational assessment of work behavior.

3) Form development. To facilitate the intake and quality assurance processes, forms and surveys were developed that were tailored for the new situational assessment service option. They were designed to be completed at home to maximize face-to-face contact time. A post-placement, structured interview format also was created to question an individual’s interest in the jobs they had tried.

III. Situational Assessment Module Design: The agency and consultant worked together to integrate all of the assessment information gathered via trainings, the literature review, staff input, and assessment manuals into a program that would be compliant with state rehabilitation (i.e., VESID) guidelines. A 24-hour situational assessment model was developed that consisted of Intake (3 hours), Testing (4 hours; at home and on site), Workplace Observation (12 hours; at 2-3 work sites matching the consumer’s goals), and Analysis and Presentation of the Findings (5 hours).

IV. Creation of a Report Format: The written report included a summary of the referral data, test results, and workplace observations (from both the evaluator and consumer); a comparison of the test results and workplace observations; suggested career options; and recommended workplace accommodations and support services. Staff worked with the consultant to write several canned blurbs regarding general information about the assessments. Following the report, presentation of the findings would take place with all interested parties for further clarification of the results and vocational plan.

V. Marketing Plan: The agency staff collaborated to create a unique name for the situational
assessment package that could be easily remembered. A letter and a three-page marketing handout were sent to all potential referral sources. The handout outlined the assessment protocol, available instruments, and contact information.

VI. Weekly Telephone Conferences: The consultant and agency staff conferred on a weekly basis to review progress. Program details, suggestions, materials that had been developed, as well as forms, were discussed to assist in establishing best professional practices and appropriate materials. At the end of each conference, assignments were given to each person to prepare for the next week. Documents and materials were exchanged via email prior to the conference so that feedback was focused.

Additional Suggestions from RRCEP II

The following recommendations and suggestions were developed by the RRCEP II staff with input from the consultant, agency administrator, and research literature.

As situational assessment continues to become the evaluation method of choice for many agencies, it is important to consider the value of integrating some formal assessments into the process. Some instruments can capture career interests and reading, language and math skills in a time and cost efficient manner. With this consumer data already understood, the evaluator can focus attention on other work behaviors.

Another recommendation is to use the situational assessment as a means to develop stronger relationships with employers. As assessment sites grow, agency staff will have opportunities to better understand the needs of employers. At the same time, employers can be educated about issues related to people with disabilities. Some employers will also be willing to participate in the situational assessment process if they see how this can help them to meet their staffing needs with minimal risk (i.e. job tryouts).

It became evident during the course of the technical assistance that staff training is a high priority. All direct service staff associated with the situational assessment program should be knowledgeable about the intake and post-placement forms and properly trained in the use and interpretation of the formal assessments. Likewise, staff should have sufficient practice in the implementation of the situational assessment procedures and in the behavioral observation of consumers at work.

Some suggested readings to begin the training in situational assessment are the previously noted book, Functional assessment in transition and rehabilitation for adolescents and adults with learning disorders by Bullis and Davis (1999) and an article, The C.A.P.A.B.L.E. process: Critical dimensions of community-based assessment, by Pancosofar and Steere (1997) which provides guiding principles for community-based assessment practices. In addition to the reading materials, consider having staff practice the various components of the situational assessment program on each other to allow opportunities for hands-on training, trial-and-error mistakes, and immediate feedback.

Keep in mind that CRP-RRCEP offers technical assistance grants for agency development and several free trainings throughout the region on topics related to functional and situational assessment and vocational evaluation. For additional information regarding scheduled trainings in your area, please refer to our website (http://www.rcep2.buffalo.edu/). It should be noted that the training, Basics of Vocational Evaluation, is also available as a distance learning option through the website. If you are unsure of what training options might be best, please contact Wendy Quarles at (716) 829-3934.

Suggested Ideas:

- Explore the value of integrating some formal assessments into the process
- Use the situational assessment as a means to develop stronger relationships with employers
- Staff training is a high priority; consider distance learning
- Review the literature
- Allow staff to practice the components of the situational assessment program
- Technical assistance grants
References


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