

Agenda

9:00 - 9:15	Introductions
9:15 - 10:00	<p>What is an Assessment</p> <ul style="list-style-type: none">• Purpose• APSE Guidelines• Example & Discussion
10:00 - 12:30	<p>Community Based Assessment</p> <ul style="list-style-type: none">• LRS Requirements & Quality Indicators• Interview Skills• Observation Skills• Selecting Career Exploration Sites• Writing Narrative Report• Developing Career Profile
12:30 - 1:30	LUNCH
1:30 - 2:30	<p>Other Types of Assessments</p> <ul style="list-style-type: none">• Situational Assessment• Trial Work Assessment• Customized Employment Assessment
2:30 - 3:00	Final Discussion and Q&A

Caveat



- The goal of this class is to provide you with tools to help in your agency's Community Based Assessment process. All tools are not applicable to every client. Use the tools that you feel will help you identify the skills, preferences, interests and support needs of your client. Each client's situation is unique.

What is an Assessment?

- ▶ Person-Centered Planning Process
- ▶ Determine SKILLS, INTERESTS, ABILITIES and SUPPORT NEEDS of the individual
- ▶ Develop a career profile and an employment plan

Positive SPIN

S = Skills

P = Preferences

I = Interests

N = Job Support Needs



Assessment Example 1



Observations from Examples

- ▶ What did you learn about the client?
- ▶ What are the client's career goals?
- ▶ What worked about the assessment?
- ▶ What did not work?
- ▶ Questions? Comments?



APSE Guidelines



Career Planning:

- ▶ Employment should be an option for any person interested in working, regardless of label, support need, or perceived functioning level.
- ▶ Job seekers, or at their invitation, family, friends, or co-workers, are the best source to personally convey information of their personal interests, preferences, skills, aptitudes, and life goals.
- ▶ These considerations are the basis for choices in employment opportunity, rather than program or agency considerations.
- ▶ In accessing information, maximum use of personal networks and situational experiences provides information to help guide career support, rather than focusing on limitations which exclude people from possibilities.
- ▶ Individual rights to confidentiality are observed.

APSE Competencies: Assessment and Career Planning



- 12. Traditional vocational evaluation: effectiveness and limitations for people with significant disabilities.
- 13. Person-centered planning processes, including personal futures/PATH planning, developing circles of support, and their relationship to career planning.

APSE Competencies:

Assessment and Career Planning



14. Personal career profile development.

- a) encourage the active participation and decision making of the person served in the career planning process.*
- b) interview the individual and others who are familiar with his or her abilities and work history.*
- c) identify the impact of an individual's cultural and social background, including class, race, gender, culture, and ethnicity, as well as role in family, church, and community; native and spoken language; and family income.*
- d) review individual records and collect pertinent information related to employment.*
- e) observe the individual in his or her current daily routines and environments.*
- f) explore non-work needs that may impact the achievement and maintenance of employment outcomes.*
- g) assess the individual's preferred style of learning, work skills and tolerances, and preferred modes of communication.*
- h) integrate relevant employment information regarding each person served into a vocational profile.*

APSE Competencies:

Assessment and Career Planning



15. Situational assessments, paid work trials, job tryouts, volunteer work, or job shadowing: uses and procedures.
- a) develop career exploration sites aligned with the interests and desires of each individual.*
 - b) assess needed environmental or job-task modifications for the person to succeed in his or her choices of employment settings.*
 - c) assess the availability of community supports and transportation.*
 - d) conduct effective situational assessments, paid work trials, job tryouts, volunteering, and job shadowing.*

APSE Competencies: Assessment and Career Planning

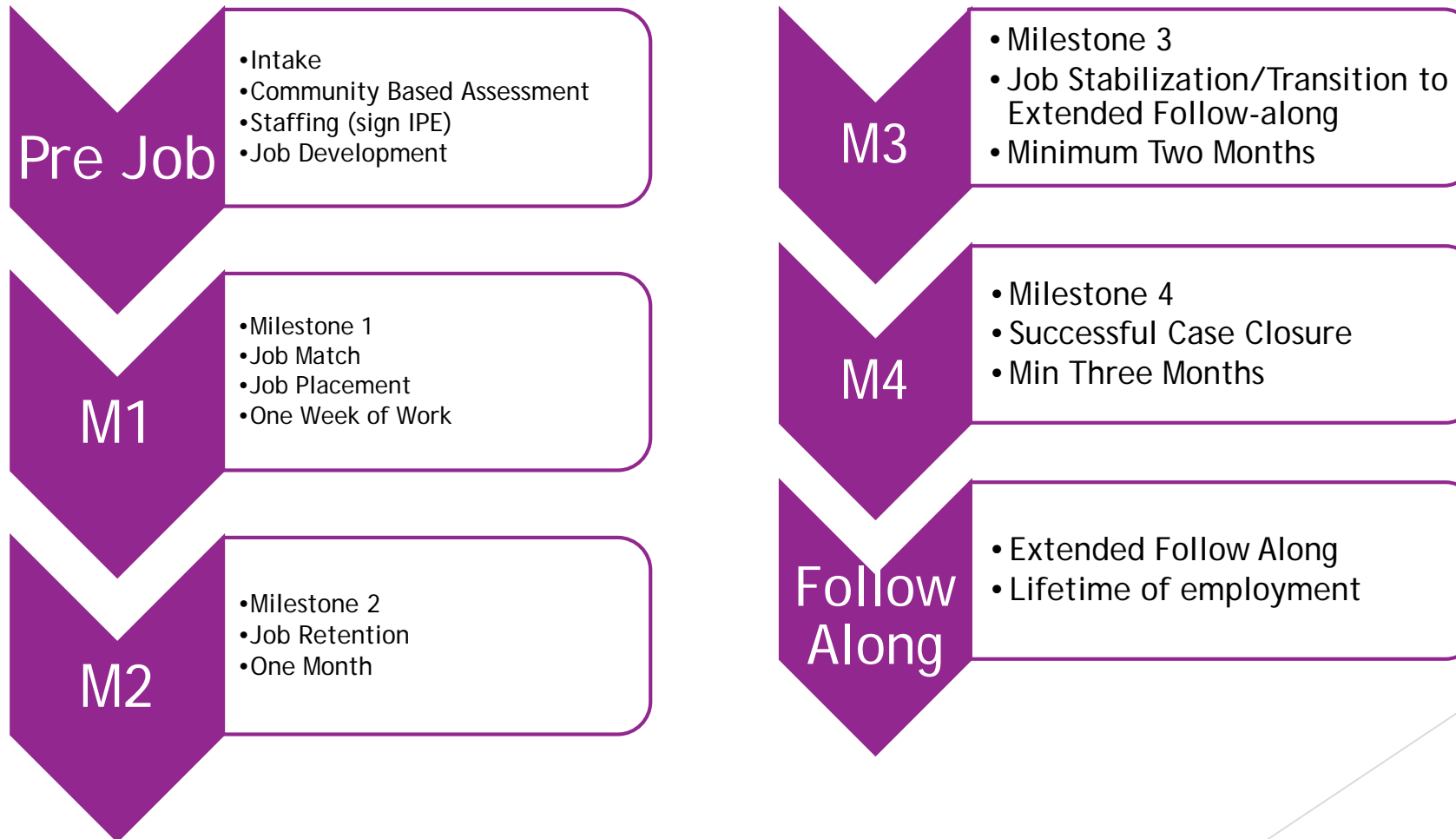


- 16. Assisting individuals to develop personal career goals and meaningful career plans.
- 17. Writing meaningful vocational objectives.
- 18. Making referrals to appropriate agencies, organizations, and networks based on individual career plans.



Community Based Assessment

LRS Individual Placement Model



LRS Documentation Summary

		Send to LRS
Intake	When Authorization for Assessment is received, Provider must contact consumer <u>within 1 week</u>	
Community-Based Assessment (CBA)	Within <u>90 days</u> , after three separate assessment meetings and Assessment is completed.	<ul style="list-style-type: none"> • SE1 • SE1A • Invoice (\$500)
Monthly during Job Development	After IPE is signed, send SE2 monthly until job match is found.	<ul style="list-style-type: none"> • SE2
MILESTONE 1 (One Week)	Job Placement: After seven days of employment send to LRS	<ul style="list-style-type: none"> • SE2 • SE2A • SE4 • Invoice (\$1000)
MILESTONE 2 (One Month)	After one (1) month of employment (Job retention).	<ul style="list-style-type: none"> • SE3 • SE4 • Check stubs • Invoice (\$1200)
Monthly until Case Closure	Send SE4 monthly until case closure.	<ul style="list-style-type: none"> • SE4 • Check stubs
MILESTONE 3 (Min Two Months)	When Job Stabilization occurs (Transition to Extended Follow-Along), minimum two (2) month). Case record must document the date job stabilization occurs and transition to extended follow-along occurs.	<ul style="list-style-type: none"> • SE3 • SE4 • SE5 • Check stubs • Invoice (\$1200)
MILESTONE 4 (Min Three Months)	When Successful Case Closure occurs, minimum three (3) months, send to LRS.	<ul style="list-style-type: none"> • SE3 • Check stubs • Invoice (\$2826)

LRS Eligibility: Functional Capacity Areas

LRS assigns Selection Group after determination of eligibility for VR services based on functional limitation in the following eight (8) functional capacity areas:

1. Mobility
2. Motor Skills
3. Communication
4. Self-Care
5. Self-Direction
6. Interpersonal Skills
7. Work Tolerance
8. Work Skills

LRS Eligibility: Order of Selection

- ▶ Selection Group 1
 - ▶ Most Significantly Disabled, Four (4) or more functional capacity areas are limited as a result of the disability (physical or mental impairment)
- ▶ Selection Group 2
 - ▶ Most Significantly Disabled, Three (3) functional capacity areas are limited as a result of the disability
- ▶ Selection Group 3
 - ▶ Significantly Disabled, Two (2) functional capacity areas are limited as a result of the disability
- ▶ Selection Group 4
 - ▶ Significantly Disabled, One (1) functional capacity area is limited as a result of the disability
- ▶ Selection Group 5
 - ▶ Non-Significantly Disabled, has a physical or mental impairment and has been determined eligible for VR services but does not meet above criteria

LRS Community Based Assessment

- ▶ Payment is \$500
- ▶ Supported Employment Vendor **contacts consumer within 1 week** of receiving Authorization for Assessment
- ▶ Employment Specialist meets with client on **at least three separate occasions in at least three different settings in the community** to obtain the necessary information.
- ▶ Employment Specialist may also:
 - ▶ review any available documentation (e.g., intake packet, LRS file, resume, etc.)
 - ▶ interview others (e.g., client's family, friends, former teachers and supervisors) for additional information.
- ▶ Within 90 days, send to LRS:
 - ▶ SE1 - Supported Employment Community Based Assessment Narrative Report
 - ▶ SE1A - Supported Employment Community Based Assessment Activities Form
 - ▶ Invoice for \$500

Assessment Quality Indicators

- ▶ Conducted in three different places in the community and on more than one day
(Consumer's home is not considered one of these three places)
- ▶ Affirms how client will benefit from Supported Employment services
- ▶ Identifies appropriate vocational goals
- ▶ Identifies job accommodations and support needs

Best Practice

- ▶ Use the Community Based Assessment to
 - ▶ Introduce your agency's services and your Supported Employment Process to the client and their support team
 - ▶ Discuss impact of working on the client's benefits (SSI and/or SSDI)
 - ▶ Discuss disclosure to employers
 - ▶ Have client choose Employment Support Team
 - ▶ Identify potential employers in client's network

- ▶ Form SE1
- ▶ Example

[illegible]

COMMUNITY BASED ASSESSMENT ACTIVITIES

► Form SE1A

► Example

SE-1A
October 2012

SUPPORTED EMPLOYMENT COMMUNITY BASED ASSESSMENT ACTIVITIES FORM

Consumer: _____ Vendor: _____

LRS Counselor: _____ Case Number: _____

NOTE: The activities summary must be completed and included as the last page of the narrative assessment report.

I. INDIVIDUALS CONTACTED:

1. Name: _____ Relationship to Consumer: _____
Date: _____ Type of Contact: Telephone #: _____
Cellular #: _____
Meeting Location: _____

Others Present:
Name: _____ Relationship to consumer: _____
Name: _____ Relationship to consumer: _____

2. Name: _____ Relationship to Consumer: _____
Date: _____ Type of Contact: Telephone #: _____
Cellular #: _____
Meeting Location: _____

Others Present:
Name: _____ Relationship to consumer: _____
Name: _____ Relationship to consumer: _____

3. Name: _____ Relationship to Consumer: _____
Date: _____ Type of Contact: Telephone #: _____
Cellular #: _____
Meeting Location: _____

Others Present:
Name: _____ Relationship to consumer: _____
Name: _____ Relationship to consumer: _____

SE-1A
October 2012

SUPPORTED EMPLOYMENT COMMUNITY BASED ASSESSMENT ACTIVITIES FORM

Consumer: John Smith Vendor: Acme Supported Employment

LRS Counselor: A. Counselor Case Number: Homework -1

NOTE: The activities summary must be completed and included as the last page of the narrative assessment report.

I. INDIVIDUALS CONTACTED:

1. Name: Sally Smith Relationship to Consumer: mother
Date: 2/14/14 Type of Contact: Telephone #: 000-000-1234
Cellular #: same
Meeting Location: consumer's home

Others Present:
Name: Bob Smith Relationship to consumer: father
Name: John Smith Relationship to consumer: consumer

2. Name: John Smith Relationship to Consumer: consumer
Date: 2/17/14 Type of Contact: Telephone #: _____
Cellular #: _____
Meeting Location: Laboratory bus terminal

Others Present:
Name: _____ Relationship to consumer: _____
Name: _____ Relationship to consumer: _____

3. Name: Jim Jones Relationship to Consumer: former teacher
Date: 2/28/14 Type of Contact: Telephone #: 000-000-4251
Cellular #: same
Meeting Location: public library

Others Present:
Name: John Smith Relationship to consumer: consumer
Name: _____ Relationship to consumer: _____

Jo'Juan Assessment - On Missing Friends



Interview Skills

- ▶ Develop Rapport
 - ▶ Start with personal
- ▶ Determine what opens them up and what shuts them down
- ▶ Ask questions in a variety of ways
 - ▶ Yes/No
 - ▶ True/False
 - ▶ Multiple Choice
 - ▶ Open-Ended
- ▶ Repeat questions in different format to verify answers
- ▶ Reflect responses to clarify understanding



Interview Skills Activity

- ▶ **GOALS:**
 - ▶ Find positive characteristics that make person employable
 - ▶ Work on interview skills
- ▶ **ACTIVITY:**
 - ▶ Pair up with one other person
 - ▶ Interview your partner for 10 minutes (Total 20 minutes)
 - ▶ Use questionnaire as guide (based on CBA)
- ▶ List five positive characteristics that make this person a good employee, use:
 - ▶ Qualifications
 - ▶ Work experiences
 - ▶ Life experiences
 - ▶ Personal interests
 - ▶ Hobbies
 - ▶ Learning style

Interview Skills Activity

▶ GOALS:

- ▶ Find skills and interests through observation and/or conversation **WITHOUT ASKING DIRECT QUESTIONS**
- ▶ Refine interview skills
- ▶ Improve listening skills

▶ ACTIVITY

- ▶ Pair up with same person
- ▶ Have a conversation with your partner for 10 minutes
- ▶ List 3 new skills or interests

Observation Skills



Observation Activity

- ▶ Sarah meets with her employment specialist at a food court in a mall
- ▶ Name the skills, preferences, interests and support needs that can be observed

Appearance

Interests

Preferences

Transportation

Time Management

Motor Skills

Mobility

Safety

Money Management

Communication

Hygiene

Location, Location, Location

Possible Career Exploration Sites

- ▶ Your agency office or office setting/library
 - ▶ Good for confidential information
- ▶ Community setting near client's home or where they are comfortable
- ▶ Work setting in the community that reflects client's interests to learn more about their interests
- ▶ Work setting in the community
 - ▶ Where you have connections
 - ▶ Where there might be an opening
- ▶ Community setting to complete an activity to learn more about the client
 - ▶ Go for walk
 - ▶ Buy a snack
 - ▶ Visit a shopping mall



Career Exploration Sites Activity

Participants are divided into groups and each group is given a vocational goal of a hypothetical client. Given that vocational goal:

- ▶ (Please state any assumptions you are making about the client that is suggested by the vocational goal.)
- ▶ Suggest at least three places to conduct a Community Based Assessment that is aligned with the client's career interest and desires.
- ▶ What will you be observing about the client at these career exploration sites?
- ▶ What questions will you ask to further explore this vocation goal?



Writing Narrative Report

Summary and Recommendations

- ▶ Confirm that client will benefit from Supported Employment Services
 - ▶ How your agency can serve the client's needs
- ▶ Outline Career Profile
 - ▶ Jobs and work areas aligned with client's interests
- ▶ Outline Employment Plan
 - ▶ Identify any potential employers (including those from client's network)
 - ▶ Identify employment support team
 - ▶ Identify job accommodations needed
- ▶ Identify Support Needs
 - ▶ Community skills (e.g., Banking, Transportation)
 - ▶ Social skills
 - ▶ Refer to other agencies (e.g., Housing)

Writing Narrative Report Activity

- ▶ Each group is given an example Community Based Assessment
 - ▶ Briefly summarize client profile
 - ▶ Identify client's vocation goals
 - ▶ What did you like?
 - ▶ What could be done to improve?

Developing a Career Profile

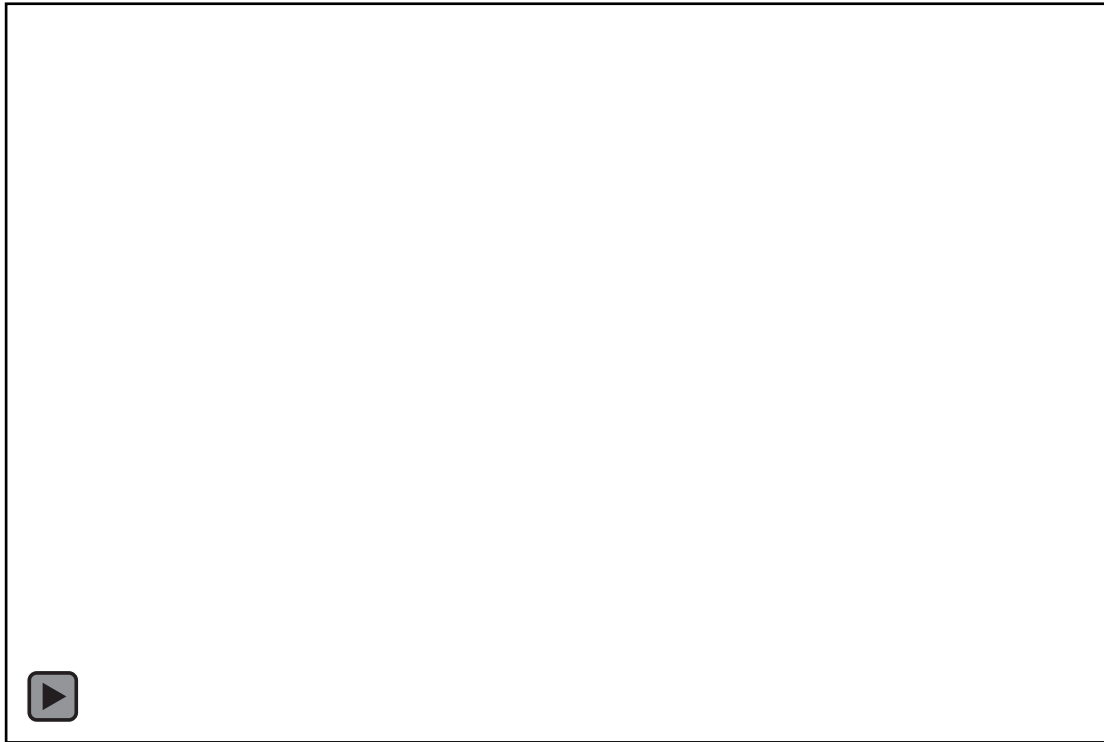
- ▶ Translate information learned in Community Based Assessment into vocational profile for Job Seeker
 - ▶ Interests
 - ▶ Preferences
 - ▶ Geographic Area
 - ▶ Industry or Sector
 - ▶ Skills
 - ▶ Environment
 - ▶ Social Interaction
 - ▶ Transportation Needs

Career Profile Activity

- ▶ In groups, given the above example Community Based Assessment:
- ▶ Think of jobs that use this skill or interest
 - ▶ Identify at least three potential work areas
 - ▶ Identify potential employers for each
 - ▶ Identify any training, accommodations and support needs

Other Types of Assessments

- ▶ Situational Assessment
- ▶ Trial Work Assessment
- ▶ Customized Employment Assessment

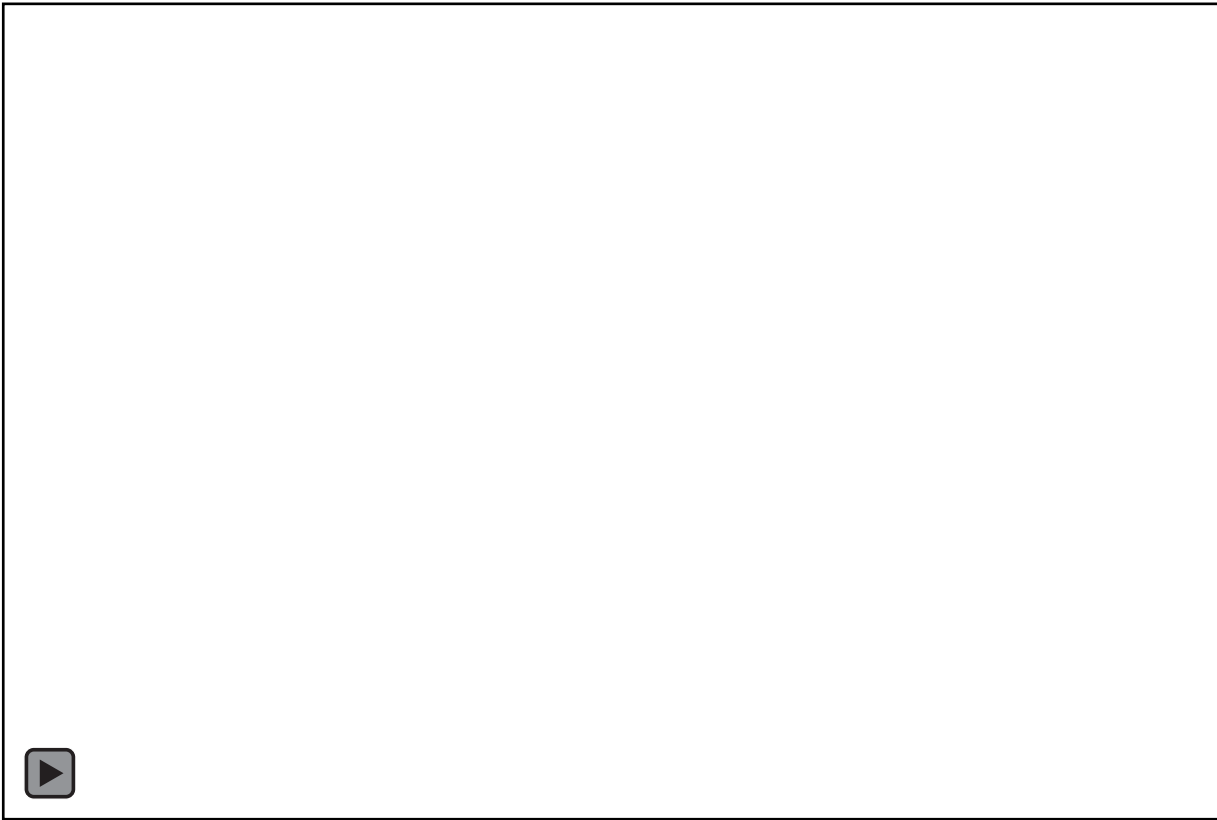


Situational Assessments

Situational Assessments

- ▶ These assessments are typically used to augment the community-based assessment information and are conducted at work settings.
- ▶ LRS can authorize these situational assessments if justified.





Trial Work Assessment

Trial Work Assessment

- ▶ LRS authorizes TWA when there is reason to believe that the individual may not be able to benefit from LRS services
- ▶ Required by federal law if LRS denies eligibility for the individual
- ▶ The Rehabilitation Act requires that a trial work assessment to be completed to ensure that the individual has been assessed at various work environments



LRS Trial Work Assessment

Trial Work Experience Assessment

Consumer: _____ Counselor: _____

Case Number: _____ Vendor: _____

Date of Assessment: _____ Assessment Site: _____

Assessment position: _____ Number of Hours: _____

*Document observations of consumer's work performance to include the following:

Is the time of day a factor? Yes _____ or No _____

Explain.

List strengths applicable to this position:

List supports needed to perform job duties:

How long can consumer work without a break?

Trial Work Experience Assessment

Consumer: Example Counselor: _____

Case Number: _____ Vendor: _____

Date of Assessment: _____ Assessment Site: Office Building

Assessment position: Document Scanning Clerk Number of Hours: 3

*Document observations of consumer's work performance to include the following:

Is the time of day a factor? Yes _____ or No X

Explain.

Schedule:
Prior: Intake Interview

Tuesday 8/13/2013
9:00-9:30 – Introductions and Explanations
9:30-11:00 – Document Scanning, Systematic Training, Task Analysis and Observation
11:00-12:00 – LSU Tour and Wrap Up

It does not appear that the time of day would affect his working abilities. Client's Trial Work Experience took place from 9AM to 12noon and he was asked to scan documents using a copy/scanning machine so that they can be retained in digital format on a computer. He arrived a few minutes late due to traffic and was driven to and from the work location by CRP personnel. He originally was reluctant to leave CRP that morning but when it was explained to him that this was for getting him a job, he was eager to go. He was alert and focused the entire time and worked through his regular break time from 10:30-10:45 without even noticing. He seems he would do well in a job where he worked mornings. He has been attending CRP for the last X years from 8AM to 3PM and working on a mobile crew for the last Y years. It would be ideal if Client could find a job that coincided with his current schedule as much as possible so as not to disrupt his routine. For safety reasons, it would be better if his job was during daylight hours.

List strengths applicable to this position:

Appearance and Preparation:
Client was very nicely dressed and well groomed. He had packed his own lunch.



Customized Employment Assessment (aka Discovery)

Employment Support Options



Typical Job

Dictionary of Occupational Titles (DOT)



Job Readiness Training

Training to improve and develop skills to obtain and retain employment including job search, resume writing, & interview skills



Direct Placement

Support with Job Development and Interview Process but not with on-the-job training and no follow-along



Supported Employment

Support with Job Development and Interview Process
Support with on-the-job training and follow-along



Customized Employment

Includes job carving or negotiation, modified job description, reduced hours or job duties, needs more intensive job accommodations and supports including on-the-job training and follow-along

Focus of Customized Employment

- ▶ Paid, community-based employment regardless of the severity of their disability.
 - ▶ Can include focus on entrepreneurial options or self-employment
- ▶ Uses Discovery and Vocational Profile to determine vocational goal
- ▶ “Customized Employment” essentially means “individualizing the employment relationship between employees and employers in ways that meet the needs of both”

(Callahan, 2002)



Customized Employment Funding

- ▶ Has NO “formal” funding streams –
 - ▶ Uses traditional Supported Employment funding
 - ▶ LRS, OCDD, Waiver, etc....
 - ▶ Encourages use of Work incentives (PASS and IRWE) –
 - ▶ Same as SE
 - ▶ Desired use of Workforce Investment Act programs (One-Stops/Career Centers)

Customized Employment

- ▶ Re-coined the “Assessment” process –

Discovery

*See Griffin-Hammis Associates Guide: “Discovering Personal Genius”

Employment - Supported or Customized

What's the difference between Supported Employment and Customized Employment?

- ▶ In theory - nothing
- ▶ In practice -
 - ▶ refocused attention to individuals with significant support needs
 - ▶ refocused attention to creativity in developing employment opportunities - e.g. the "customize"
 - ▶ refocused attention on the importance of the "assessment" or "discovery"

Assessment/Discovery

- ▶ So whichever tool/process is used....
 - ▶ Sufficient time should be spent with the job seeker in:
 - ▶ Known environments and
 - ▶ Unknown environments
 - ▶ Sufficient time should be spent looking at interests and strengths
 - ▶ Sufficient time should be spent in **determining employment supports** that are needed to assist the job seeker to become employed.

Assessment/Discovery

- ▶ Needed information will vary from one individual to the next.
 - ▶ **NOT JUST A FORM** - but a way of thinking and identifying supports and strategies to assist an individual begin/continue a career path
 - ▶ Doesn't always result in a "DOT" (dictionary of occupational title) code.
 - ▶ May result in a defined "environment" - few people, repetitive tasks, no fluorescent lights, etc.

Final Discussion and Q&A

At your agency:

- ▶ Who conducts the assessment?
- ▶ What is the process?
- ▶ How many staff are involved?
- ▶ What environments?
- ▶ How long does it take to complete the assessment and provide a written assessment to LRS?

