Using Alternatives to Traditional Vocational Assessment: The Why and How of Exploration Strategies such as Discovery

The starting point of virtually all traditional approaches to assisting job seekers with disabilities has been to assess their skills and interests. These assessments, most often, have taken the form of comparisons between the individual of concern and general factors felt to be representative of the specific demands of employers in the competitive job market. Relying on protocol based procedures, established norms and predictive validity, professional evaluators test individuals using an array of instruments and assessment criteria. If job seekers perform well in comparison to established norms, they are predicted to do well in certain areas of employment. If they do not do well, evaluators advise that those types of employment be avoided. Therefore, on the face of it, vocational assessments should be a useful tool for funders, counselors and providers to use to guide job seekers toward the best match for successful employment.

However there is an important downside to these evaluations. Although comparative assessments have traditionally been a useful starting point for the journey to employment for many individuals with disabilities, this approach has been problematic for job seekers with more significant impact of disability. When compared to normative performance, many individuals with significant disabilities simply do not compare well. The result of this has too often been exclusion from employment services and from being considered appropriate for work. When a person performs poorly on a vocational assessment it is likely that sheltered, facility-based employment will be recommended rather than community integrated employment. In many ways the continued use of comparative assessments has resulted in the steady increase of sheltered employment over the past 25 years.

What is an alternative to comparative assessment?

As the number of individuals who performed poorly on comparative assessments has continued to increase, practitioners began to look for alternatives to these strategies. The first consideration was to make assessments more *functional*. That is to say that evaluators strived to increase the similarity between the factors being selected for comparison and the actual demands of community workplaces. For instance, rather

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than having an individual place pegs in a peg board to assess dexterity and speed, evaluators might provide use real work tasks found in local workplaces to test performance. Real tasks could be brought into evaluation centers to replace the array of general performance activities that were traditionally used. This move undoubtedly made assessments more reflective of actual demand but the demand comparison remained. Persons with significant disabilities often performed no better on functional tasks than on the traditional ones.

Another common strategy to increase the usefulness of assessments for job seekers with significant disabilities has been to use *situational assessments.* This approach involves taking the individual to an actual job site and using real job tasks and demands as the comparison criteria. Again, the use of this concept attempted to minimize the artificiality of assessments in a hope more individuals would be successful in the actual work environment performing real job tasks. However, as with all strategies that rely primarily on comparative procedures, many job seekers with significant disabilities have performed unsuccessfully on situational assessments.

Are we saying that evaluation is "bad"?

In fairness to vocational evaluators, these and many other efforts have been made to improve the positive usefulness of assessments for job seekers with significant disabilities. However it has finally become clear that the problem that we face is not the skill or attitude of evaluators or even the type of instruments or procedures used; the problems lies in comparison itself. When the impact of significant disability is in the area of human performance, it is inevitable that comparative assessments will verify that impact. And the result will be negative in almost every case. This creates a conundrum for those interested in assisting individuals to become employed. If assessment procedures accurately represent the demands of employers by becoming more functional and situational and if individuals with significant impact of disabilities routinely perform poorly in relation to those demands, how can those individuals become successfully employed?

The answer to this dilemma is actually quite simple: We can assist individuals with significant disabilities to prepare for employment by not using comparison. To do this requires at least two important changes on the part of employment professionals. First, it is necessary to use a non-comparative strategy that is based on qualitative findings rather than on quantitative measures found in virtually all comparative assessments.

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The Discovery process developed by Marc Gold & Associates is an example of a qualitative focused approach that meets this need. Secondly, it is also necessary to shift the focus regarding the outcome of employment from competitive demand to the negotiation of a customized, contribution-based relationship with an employer. The Discovery process is one of a number of emerging strategies that seek to understand who the individual is, as the primary source of information for employment, rather than how the individual compares with established norms, with general demands or with others.

What are the Characteristics of a Discovery-based Strategy?

The most fundamental distinction between discovery-based strategies and comparison-based strategies is that it is impossible to "fail" discovery. Discovery seeks to find the best dimensions of performance for each person, in the most ideal circumstances that enhance that performance and connected to the strongest interests of the individual. Discovery strategies proceed from the recognition that all individuals, including individuals with significant disabilities, exhibit competent performance in the course of living their daily lives. Of course all performance is not equally competent. Instead of finding that an individual's performance might not compare well with others, Discovery seeks to find the best performance in each person's life and to use that information as a foundation for the employment relationship. Of course many aspects of daily life performance might not relate to the needs of employers so it is also necessary to *translate* the competent performance that is discovered into business terms and business tasks.

In order to assure that the best dimensions of a person's performance are recognized, it is critical to get to know people in settings and in activities ***where*** *they are most* ***who*** *they are* – in other words, where they are at their best. This is often the opposite of what happens in comparative assessment. In that approach individuals are observed in settings and in activities that we feel represent the demands of employers. Additionally, Discovery strategies allow for a relationship to build between the facilitator and the individual over a reasonable amount of time. It is recommended that the activities, interactions and observations of discovery occur over a period of a month to a month and a half. This timeframe not only allows for trust to develop it also provides a much richer array of activities from which to uncover competence and other information about the individual.

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Discovery is a process that is:

- Optimistic, looking for the best that people have to offer
- Descriptive, focusing on who the person is rather than on our opinions
- Respectful, always proceeding with the permission and direction of the individual
- Accepting, not requiring comparison with other
- Humble, appreciating the intimate access given into a person's life
- Comprehensive, examining all areas of life performance
- Robust, looking deeply into the most meaningful aspects of the person's life
- Relevant, making sure the process makes sense to the person
- Connected, taking advantage of relationships and associations
- Bold, translating life skills to employment possibilities

What is the focus of Discovery strategies?

When entering into a Discovery-based approach with an individual it is necessary to start broadly, including as many aspects of the individual's life as possible in an effort to find the information necessary for success. But what is the essential information necessary for employment success? With a typical person's life encompassing numerous domains of performance in multiple settings, it could easily become overwhelming to try to glean essential bits of useful information. Because of this, Discovery strategies focus on three aspects of an individual's life that provide sufficient direction for success: a) *Conditions for success,* b) *Interests toward certain aspects of the job market,* and, c) *potential Contributions to employers.* The framework of conditions, interests and contributions have proven to be fully sufficient to guide efforts to achieve successful employment.

Conditions for success refer to characteristics felt to be necessary for the success of *any* job developed for the individual. Conditions refer to issues such as days of work, pay, benefits, location of the job, inside/outside work, time of day, hours per week, etc. They also refer to factors such as the best environment for working, the most effective supervisory style, the proven solutions to challenges and other such features of success. While it is possible to have too many conditions, these are extremely important considerations in customizing a job. Discovery allows time to target the most critical conditions for priority consideration.

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Interests toward an aspect of the job market give direction toward certain general areas of work for which there is likely to be intrinsic motivation for the individual. Work interests for Discovery are well beyond verbally-stated job preferences. Discovery seeks to identify those performance activities that reflect a much deeper connection with the job seeker. If we are truly accurate in discovering interests, the person might say, "You mean they will pay me for doing this job?" Work interests should be stated in the broadest possible manner, allowable by the applicant being sure to *avoid* using job titles. Generally stated work interests might include working around boats, performing office work or working in a retail setting or repairing cars.

Contributions refer to what the individual will offer to employers in return for the pay received. Traditionally, employers have perceived a job seeker's contributions in reference to the job description that is often developed for an open job. Traditionally, job seeker contributions have been considered in relation to the general demands set forth by employers in job descriptions for open jobs. Employers competitively rank the qualifications and experiences of applicants who apply for various jobs and, theoretically at least, choose the best applicant from among those applying. In using the customized employment approach, a job seeker's contributions are uniquely considered in reference to specific needs and benefits relating to any potential workplace that matches the job seeker's interests. When considering an individual's potential contributions for a customized job, employers focus on:

Positive personality characteristics
Specific skills that relate to employer needs/benefits
Credentials indicating mastery of a skill or skill set
Experiences in employment or work preparation
Recommendations employers, supervisors and educators

By understanding the outcome focus of this process, facilitators can better manage the vast array of information that arises from discovery. The Profile format assists facilitators to organize and synthesize what is learned about the individual to guide the customized plan for employment.

What are the tools of Discovery?

In its most essential form, the tools of Discovery are the tools of the qualitative researcher, the social scientist, the anthropologist. But instead of using the traditional

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social science tools to understand a large culture, Discovery focuses on the individual. Regardless of the distinctions, the tools are the same – conversation, interview, observation, participation and review of existing information. Noticeably absent from this listing are the comparative tools of the quantitative researcher – assessments, tests, surveys, lists, performance requirements, etc. Since Discovery seeks to understand who the person is, essentially, rather than how the person compares to others or to norms, facilitators need to use a different tool kit. It can be said that traditional evaluators test, compare and predict human performance. Facilitators of this approach discover the individual's life and translate current skills to potential benefit to employers. The distinction is huge when working with individuals for whom prediction has routinely been negative or uncertain.

Using the verbal tools of conversation and interview

Facilitators of Discovery typically begin the process of learning about the individual by starting with a verbal interaction with either the person of concern or with family members, as appropriate. Since most information about people is conveyed verbally this is an understandable starting point. But the verbal strategy is not without its potential pitfalls. Some individuals with significant disabilities do not use verbal interactions for communication. And others who can speak might not understand the meaning or nuance of the language used in a verbal exchange. A primary consideration of Discovery is that when verbal communication is an issue for an individual and or a family, other tools must be used as the primary strategy to learn about the person.

An important distinction to make when using a verbal strategy is to distinguish between the two most typical verbal styles – conversation and interview. Conversation entails an informal, non-directed exchange between two individuals. For many people conversations feel comfortable, even enjoyable, but the strategy may result in unintended consequences. Since conversations are informal, individuals and families may lose sight that Discovery is a professional service seeing it more as an exchange between friends. And since conversation is not directed toward a goal, it's easy to waste time with exchanges that do not result in useful information. However, a clear benefit of conversation is the development of the trust that is so necessary for sharing one's life with another.

The other side of the verbal coin is the structured, focused strategy of interviewing. Interviews involve asking the individual, family or others questions that have been developed prior to the interaction in hopes of obtaining specific information. By preparing for the exchange and by asking questions in a sequence that allows information to build in a sensible manner, interviews, at least in theory, can result in a lot of usable information in an efficient manner. However, just as with conversation, interviews can have negative, unintended consequences. Almost all people respond differently to interview exchanges than they do to conversational exchanges by being more succinct and cautious. When interviewed, people often try to figure out what the interviewer wants and then answer accordingly.

It might seem from these concerns that it may be best to leave verbal exchanges out of Discovery completely. However it is possible to have it both ways, to take the benefits of each strategy and avoid the negative aspects. This is possible through the use of *conversational interviews.* Conversational interviews involve using a verbal exchange that has a conversation tone and informality with a subtle interview structure. When mastered by facilitators, the use of conversational interviews can generate access to positive and useful information and the development of trust, balance and informality. To achieve this style of verbal exchange facilitators must find their "genuine voice" and use it in all verbal interactions. Facilitators must also prepare of each interaction so that the questions and topics to be covered do not have to be read but, rather, can be asked as if a part of a true conversation. And finally it's critical to stay focused so a useful flow of questions can be maintained and so the facilitator can remember the important information learned.

In addition to conversational interviews, facilitators of Discovery also use *observation* as a primary strategy for determining "who is this person?" Observation involves watching the performance of life activities by the person of concern. This strategy may be performed in two ways: a) observing from a position outside the activity and b) observing as a participant of the activity. Each of the two aspects of observation require different considerations by the facilitator. When observing outside of the activity being performed, the facilitator must do the following to assure both effectiveness and sensitivity to those being observed:

- Always ask for permission of the individual and others in the setting
- Introduce and explain yourself
- Offer to share you notes

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- Focus on an array of actions: task performance, social interactions, subtleties, best dimensions
- Stay focused throughout
- Use short, discrete observations rather than lengthy, general observations

When observing as an aspect of participation, the facilitator is actually blending two tools at once: observation and participation. By participating in the activity the facilitator has to opportunity to better understand the nuance and feel of the activity being performed. However, social scientists have traditionally been cautious of this strategy because of worry that the presence of someone who is typically not a part of the activity might negatively influence the performance and thus our understanding of what is occurring. The best approach for facilitators to take is to use both aspects of observation during Discovery and to carefully consider when and when not to participate. When using observation from within an activity, the facilitator should:

- Allow the person to take the "lead" on all decision points
- Assume the role of a colleague or friend, not a trainer
- Engage in conversation germane to the activity
- Stay focus and try to remember important aspects of performance
- Take notes immediately afterward or during natural breaks of the activity
- Look for indicators of interests, discrete skills, challenges, and conditions

Participation in activities of life

Participation in activities of life is a tool of Discovery that blends with the observational strategy discussed earlier. When participating with an individual of concern in an activity that comprises successful performance for the individual, the facilitator not only gets to observe from within the activity but also has the opportunity to get a feel of the task, to get know others connected to the activity and to experience issues such as fatigue, complexity, nuance, and other features that observation alone might not indicate. The finesse for facilitators is to multi-task. It is important to be "present" as a participant in the activity itself and, at the same time, to note the various aspects of the individual's performance. In addition to the suggestions listed above for observation within an activity, facilitators should:

- Consider the typical way an activity is performed prior to joining the individual
- Target the embedded tasks that occur within the activity
- Look for tangential aspects of the task such as unexpected issues

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- Remember the names of individuals who might provide additional information
- Note whether the tasks is routinely or episodically performed
- Consider whether the activity represents a “best dimension” of performance for the individual

Review of existing documents

The *last* tool of Discovery is a review of existing documents that have been developed on the individual. These documents include permanent records held by schools and service agencies, evaluation results, scrapbooks, family memorabilia and other official and unofficial files. The reason to wait until the end of discovery is that most documentation of an official nature on individuals with disabilities is inherently negative, too often focusing on problems, deficits and incidents of concern. While it may seem unproductive to review this type of information at all when performing an optimistically-focused service, it is important for facilitators to know about possible challenges to success. By getting to know the individual *first* before reviewing files and other materials, facilitators receive an inoculation against pessimism. When reviewing files and records the facilitator should:

- Look for the positive aspects of records
- Be skeptical of the record rather than the individual
- Look for possible solutions to complexities
- Follow up with interview of individuals who seem hopeful in their writing

What are the basic components/steps of an exploration process like Discovery?

When implementing an alternative to traditional assessment it is important to follow a protocol that offers facilitators, individuals and funders a degree of certainty that a professional and effective process is used. While there are many ways to implement Discovery, the following components should be utilized in any effort to provide an effective exploration and understanding of an individual’s life.

- Describing the process and outcomes prior to Discovery in a preliminary meeting
- Visiting the individual’s home & neighborhood
- Interviewing persons close to the individual
- Observing activities of the individual’s daily life where they are at their best
- Participating in activities of the individual’s daily life where they are at their best

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- Observing/participating with the individual in an activity(ies) where he/she is most familiar and competent
- Observing/participation with the individual in an activity(ies) that is novel to the individual but that otherwise matches their conditions, interests and contributions
- Reviewing the existing documentation available on the individual

While these components may be described differently within the various approaches to Discovery, it is critical to include these for any effort that provides an alternative to traditional assessment. For a specific set of steps to Discovery, see marcgold.com. Marc Gold & Associates is a network of consultants that developed the original conceptualization of Discovery and provides manuals, articles and webinars for additional resources. MG&A publishes the manual, *Discovery, Charting the course to employment* as a source document. See the discussion under the tools of Discovery for a description of these strategies.

The importance of describing the process and outcomes prior to Discovery in a preliminary meeting

Prior to initiating Discovery it is critically important to meet with the individual, family and other allies, as appropriate, to fully explain the process, the need to come to the individual's home and other places that comprise his/her life and to talk to trusted friends and professionals about the individual. This component allows for questions and concerns to be addressed prior to the initiation of Discovery activities. Without this meeting it is common for the individual and family to be confused as to both the process steps to be implemented and to the outcome of process.

Visiting the individual's home & neighborhood

Framing Discovery through the lens of the individual means starting where people "are most who they are" by visiting their home and neighborhood. The initial step of any exploration should reference the individual's home and neighborhood though a negotiated visit. Please note this is not a bureaucratically required "home visit" but rather a "visit to a person's home." The distinction is huge in that in Discovery we must always be welcomed into a person's home rather than telling a person we have to agree to a meeting in their home. In addition to the initial meeting of about an hour, there will likely be several other visits that will be necessary during discovery. On average, between three to four visits to a person's home are made during Discovery. Facilitators

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should also get a feel for the general neighborhood in which the person lives noting the reality in which he/she lives.

What are important factors to be considered when facilitating Discovery?

There are a number of factors that facilitators must consider during the process of Discovery. When these factors are addressed well, Discovery is often successful and meaningful. When they are overlooked, process suffers and, hence, the likelihood of success decreases. The following are important factors to consider during Discovery:

- Note taking and remembering what you learned
- Obtaining imagery
- Building a trusting relationship and dealing with reluctance and uncertainty
- Keeping Discovery a professional service by the facilitator
- Respecting privacy and considering mandatory reporting
- Knowing when you are done
- Starting with the end in mind
- Developing a document(s) to capture Discovery

Note taking and remembering what you learned

Even the most meaningful Discovery experience will be diminished if facilitators rely solely on their memories of events. Social scientists have realized for decades that critical details of observations, interview responses and insights will be lost unless they took notes of the interactions. So to do facilitators need to account, in writing, for what is learned during Discovery activities. The notes can be informal and individualized to the style of the facilitator as formality is not a key consideration. More important is a commitment to routinely take notes during each and all activities. Also, if notes are taken in a descriptive manner, it will be easier to write up a formal Discovery report, often referred to as a Profile document.

Obtaining imagery

In addition to note taking, the availability of imagery is an addition component of successful Discovery. During Discovery facilitators should dig for existing imagery such as in photo albums, family computer files, scrapbooks and agency/school collections. We should also ask for and obtain written permission to take images during Discovery activities, especially during observations and participation in life activities. The easiest imagery is now digital, not requiring the expense of development. Smart phones and digital cameras are virtually ubiquitous and create little intrusion into daily life activities. Short burst video (30 seconds to 2 minutes in duration) using smart phones and digital “flip” cameras also provide a rich way to capture performance without undue intrusion. These strategies provide “digital notes” for the development of discovery documentation.

Building a trusting relationship and dealing with reluctance and uncertainty

Many facilitators worry that individuals and families will be reluctant to allow for the seemingly intrusive activities of Discovery. In actuality, most individuals welcome the process and provide unfettered access to their homes and their lives. Regardless, facilitators have an obligation to proceed with care and deference each time they enter a person’s life. And when they do encounter reluctance, facilitators must carefully and respectfully give the time and information for a trusting relationship to development. When individuals are reluctant to have a facilitator in their homes, we should negotiate a compromise location that reflects some connection with the individual but avoids our offices. A church, library, community center or local café might serve as an initial location that can substitute for a visit to the person’s home. Typically, when the individual or skeptical family member realizes that the facilitator is respectful, optimistic and sincere, initial reluctance will fade away. It is important to say that for some people, facilitated Discovery just will not be a strategy that they will accept. In those cases facilitators will either have to offer a form of group or self-discovery or use a more traditional assessment strategy.

Keeping Discovery a professional service by the facilitator

The successful facilitation of Discovery requires the maintenance of a delicate balance. It is necessary to access aspects of the person’s life that lie “beneath the surface” of what is typically available in professional interactions. Discovery is a bit like learning things about a work colleague at a holiday party at the individual’s home. This familiarity allows for a deeper understanding of the individual and is critical to translation. However, that same familiarity can be confusing to the individual of concern and even to family members. Facilitators must always send the message that Discovery is a professional service but it is performed in a an informal and familiar manner. If it seems that the individual is becoming confused, the facilitator must gently pull back and even speak directly to the confusion, as appropriate. This balance is one of the most challenging aspects of Discovery for many facilitators. We know that strategically sharing information in a two-way manner can build trust and a deeper relationship but the same sharing can blur the lines of the professional/friend distinction. All successful facilitators should constantly monitor the balance that is necessary to avoid confusion. Any desire to enter into an appropriate friendship should happen after Discovery, not during.

Respecting privacy and considering mandatory reporting

The unprecedented access offered into people's lives by Discovery can create dilemmas as to whether a situation observed or learned about should remain private or whether it should be reported and written about, perhaps even legally. Facilitators must realize that the implicit value of respectfulness in no way excuses them from any legal reporting that is mandatory. It is important to understand and follow both organizational and state policies on one's obligations to report certain activities observed or learned about during Discovery. However, beyond those requirements, facilitators should generally accept what they observe and learn about during discovery and consider the situations in regards to the impact on employment success. An essential pact of Discovery between facilitators and individuals is that the information belongs to the individual and family, as appropriate, and the use and dissemination of any information should reflect approval by the person. If facilitators are in doubt, it is recommended that they talk to colleagues and supervisors for advice and then talk directly to the individual and/or family before sharing any potentially embarrassing or troubling information.

Knowing when you are done with Discovery

A potentially confusing aspect of discovery is determining when Discovery activities should be discontinued and the next steps of the process be implemented. After all, in many ways, Discovery never ends. But it needs to have an end point if we are to ever move forward in the employment process. One strategy is to use a Profile outline as a format for formally documenting the information discovered about the individual. When the facilitator has sufficient information to complete a profile, it is time to move on. Another indicator is a developing image of work possibility that most facilitators carry in their heads. Early in Discovery, the image of work possibility is blurry or missing altogether. As Discovery proceeds images of possibility begin to crystallize in the mind

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of the facilitator. When the facilitator clearly sees conditions for successful employment, interests towards certain aspects of the job market and potential contributions that could be offered to employers, it's time to wrap up Discovery. Indeed many facilitators will begin to see, conceptually, a cogent picture of a number of ideal work situations – not job titles – that are reflective of what is known about the individual.   When two or three alternative images of ideal work situations begin to form, Discovery can safely be ended.

Starting with the end in mind

The author Stephen Covey suggests that in implementing any process, it is advisable to start with the end in mind. This is very true when facilitating Discovery. The degree to which facilitators have a clear outcome identified, such as the development of a customized job for the individual, will focus and improve the process. It is not advisable to begin discovery as an end in itself. While it is true that the vast majority of individuals find discovery to be an enlightening and enjoyable activity, it is not enough to learn about a person and then stop. Discovery must serve a higher goal to be effective.

Developing a document(s) to capture Discovery

Discovery is not truly complete unless there is some sustaining documentation to account for what was learned during the process. All fundable human service activity reflects this reality, from the most negative assessment report to the most useful and optimistic profile. In order to meet professional and funding expectation, facilitators must embraced the necessity to write about what was learned in a manner that captures the wealth of information and that provides an effective foundation for employment planning. Marc Gold & Associates has developed a three part Profile document that has evolved over the past twenty five years. This document, as well as samples and guides are covered in a manual, "*Profiles: Capturing the information of Discovery* available at marcgold.com. As with Discovery, the MG&A website also contains outlines, guides and samples that can be downloaded and used as the format for a professionally developed Profile Document.

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