

# 3

## Customer Profile

The critical first step in assisting an individual to find a job is getting to know that person through the development of a customer profile. This involves a variety of interview, observational, and information gathering activities aimed at capturing a picture of who the individual really is and what his or her interests, skills, and desires are. Traditionally referred to as customer assessment, this component of supported employment focuses on finding out as much as possible about an individual to establish a foundation which will serve as a guide during job development, job-site training, long term support, and the career advancement activities that follow. The development of a customer profile and related assessment activities are conducted for the purpose of assisting the customer with obtaining the type of work which offers the job characteristics and opportunities that best match the person's preferences and lifestyle.

The importance of developing a customer profile cannot be overemphasized or ignored. Without this critical step, it is likely that the entire supported employment process will in some way be affected. Despite its significance, developing a customer profile is frequently overlooked or short changed during supported employment implementation. In an

effort to move forward with the job placement process, essential pre-employment activities are sometimes perceived as unnecessary, time consuming, or too costly forcing limited resources to be targeted for other activities. Often, one piece of the profile, such as an evaluation conducted by another party or a pre-determined image from a workshop staff, are substituted as the only source from which the remaining decisions are made. The truth of the matter is that any short cuts taken during the up front end are likely to result in increased time in the long run due to additional training and support needs, customer dissatisfaction, or job loss and replacement issues.

Most individuals who are referred for supported employment have undergone numerous evaluations throughout their lives to determine eligibility for services. At times, these formal evaluations can be informative; however, employment specialists must keep in perspective that formal evaluations are only one small piece of the profile process. Careful consideration needs to be made as to the purpose of previous evaluations, the procedures and instruments used, and the context of the interpretations.

Typically, vocational evaluations or standardized tests are conducted for a specific

purpose in which a person must meet a certain level or criteria, forming the basis for the interpretations and recommendations that follow. In many circumstances, this criteria is unrelated to that which is actually required by a competitive job or the skills that an individual would need to possess in order to perform the job. Keeping this important point in mind, it is easy to see how the valuable information that would contribute to an individual becoming employed is **not likely** to be obtained with these methods.

For example, an intelligence test may be performed for the purpose of diagnosis. However, an IQ score would not provide information for making employment and support decisions, such as where to work or how to teach job skills. Similarly, reports that are interpreted developmentally, for example, stating that an individual's level of functioning is at the third grade level, offer little information about the person's employment capabilities or support needs. Finally, a paper and pencil test administered in a classroom setting to assess an individual's "readiness" for work is likely to indicate significant skill deficits despite the person's ability to perform tasks independently in the natural environment where they occur.

In contrast, a functional description of the person's abilities provides a much clearer picture of his or her skills and support needs, such as reads numbers on a watch but is unaware of time, rides a bus with assistance, or can follow one-step directions with a verbal prompt or picture cue. Very different decisions regarding training and support to assist an individual with work would be made if the

decisions were based upon direct observation or conversations with the family and individual as opposed to test results. This chapter describes the important characteristics central to the completion of a functional assessment which results in useful and relevant information representative of the individual's gifts, interests, and preferences. Following this, strategies and techniques for gathering assessment information and developing a customer profile for use in assisting an individual with becoming employed will be described.

### HANGING FROM THE "OLD WAY" OF DOING ASSESSMENTS

How assessments are planned or conducted, and what methods are used will depend upon the policies and procedures of each supported employment agency. Often, procedures are used, because this is the "way things have always been done". However, careful scrutiny should be given to just exactly how the assessment process was developed. Perhaps, the guidelines were established when the program's focus was on providing center-based (e.g., sheltered workshop, work activity day program) rather than community-based employment, both of which have a very different set of expectations. Similarly, the assessment process may have been designed prior to supported employment legislative mandates and funding allocations when a more traditional approach to vocational services was in place. Finally, outside referral sources or funding resources may be placing pressure on programs to conduct assessments a certain way

which rely on evaluative measures and omit many of the essential core elements. If employment specialists find themselves caught in the midst of these and other scenarios which restrict their ability to conduct assessments in the way that this chapter describes, they should not despair. Even if a program or agency is not willing to adopt the approaches outlined in this chapter, **an employment specialist can make a difference**, with how supported employment services are provided. At a minimum, they can follow some of the guiding principles and techniques in their everyday activities.

For example, read beyond the judgments made about a customer in a standardized report. Do not characterize a behavior as good or bad, or something that will prohibit employment. Define a behavior as one more unique piece of information about the customer in the context of training and support needs. In addition, capture every opportunity to talk with each customer and other key persons in his or her life to find out their dreams, expectations, and wishes. When performing other related supported employment activities, incorporate informal assessment techniques at the same time. As the advantages associated with this assessment approach become obvious, these strategies will have an impact upon the employment outcomes of the customers being served and may have a rippling effect within a program's practices as well.

## **P**ERSON-CENTERED PLANNING

The entire supported employment process should be guided by the customer with the

profile process being central to that endeavor. Remember, the customer will be working at the job that he or she gets, and a critical piece of being successful and satisfied at work is choosing what you are doing (Parent, in press). If other persons, particularly those who do not know the customer well, make decisions about what they feel is "best", then the chance of the employment situation being rewarding to the customer is jeopardized.

Often, individuals with disabilities express frustration that professionals undermine their choices by not providing them with all the information. Or, professionals pre-screen what the individual needs to know, or they make initial choices for the customer based on what they feel is most appropriate for the person (Brooke, Barcus, & Inge, 1992). Questions are sometimes phrased as false choices, such as: "would you like to work at a restaurant?" "Would you like to work at the grocery store or not at all?" Someone who has never worked or is anxious to have a job may select an option that he or she doesn't want resulting in a short employment tenure through job loss or an effort to change jobs. While some programs and agencies have done a tremendous job assisting persons with career advancement and job mobility, the reality of the situation is that individuals typically keep the first job they get. Provisions may be in place to make changes; however, it is not uncommon for a customer to have a lengthy wait for services following a decision to move on.

Pursuing an individual's employment interests and career path using a person-centered approach can create a "road map" for

making the necessary job choices and career advancements that are critical to achieving one's goals. The process begins by focusing on the individual's dreams, and how they can be realized. The identification of the customer's dreams is accomplished by getting to know the person and what is important to him or her. For instance, spending time with the person to gain his/her trust and confidence is clearly the first step in the process.

### **Strategies for Developing Relationships and Defining the Customer's Career Path**

The only way an employment specialist can represent supported employment customers to employers is to believe in and know their customers' abilities and interests. This does not mean reading standardized test results, formal records, previous medical or psychological reports, or case study notes written by former professionals involved with the customer. This information does not allow the employment specialist to get to know the real human being behind the pieces of paper.

For example, information such as what the customer enjoys, what a day in his or her life is like, what kinds of things are of personal interest, and what are stressful concerns, are lost in the translation of a second party report or unrelated evaluation. Interestingly, these factors are precisely what contribute to the decisions regarding the kind of work and characteristics of the job (e.g., hours, location, type of business, co-workers) that an individual chooses to do and, most importantly, is happiest doing. For any employee, with or without a disability, the greatest satisfaction

tends to result when the attributes of the employment situation are most compatible with his or her personal tastes and real life circumstances.

An important way to begin to think about getting to know a supported employment customer is to think about yourself. Consider all of the many factors that come together to make you the person who you are. Now, speculate about how you would feel if the only introduction someone had about you was an isolated description of one facet of your life. It is quite likely that this written summary would portray a significantly different image and surely an incomplete or inadequate picture of who you are.

Similarly, if you reflect upon yourself, you can gain insight into what it takes to get to know you, and how this can be accomplished. Chances are that what you discover will be useful techniques for breaking the ice and developing the important relationship between the employment specialist and the customer. The following questions provide some points for an employment specialist to consider about herself or himself before attempting to get to know a new supported employment customer.

- What makes you comfortable and eases the tension in an uncomfortable or unfamiliar situation?
- What types of things make it difficult for you to share information, and what strategies help you to open up?
- What do you like others to do when you are in a position to work with or provide information to someone in authority or with decision-making power?

## **Spend Time Getting to Know the Customer**

When arranging a time to get to know the customer, it is best to suggest a comfortable location of his or her choice (e.g., the person's home, a restaurant, or a park bench). The situation to avoid is meeting at the organization's office. Typically, an office setting is intimidating, particularly for customers who have a long history of meeting with service providers and other professionals. Some of these experiences most likely have not been favorable. In addition, the office setting places the employment specialist in a position of power which may threaten the customer rather than foster the development of a relationship.

Meeting on the customer's "turf" automatically instills a certain degree of comfort as well as provides a reference point and framework from which the employment specialist can pose questions. Characteristics about the selected meeting place can provide clues that are useful in identifying a work setting for the customer. For example, if the customer chooses to meet at a restaurant, the employment specialist may find out if this is a favorite place for the individual and why. This type of information usually will go unnoticed in a meeting at the office, because the right questions are never asked. Or, the customer may feel it is not important to offer; however, other questions about interests, friends, and potential job choices may naturally evolve.

Perhaps a family member, friend, or advocate will participate in the initial meeting, sometimes making "going to them" much easier and more convenient than if they came to

the supported employment organization. In addition, having an advocate or family member present may be important when meeting with a person who is challenged by limited communication skills. The employment specialist should make sure that the customer has chosen this advocate or person if a third party is included in the meeting.

During the initial meeting, take the time to get acquainted engaging in small talk about topics and conversational items that the customer feels comfortable with and can contribute to. The employment specialist may want to ask family members or friends to supply topics of interest that may put the customer at ease such as a favorite sport, love of animals, particular music interest, and so forth.

Observe the customer's method of communication: verbal as well as nonverbal messages, mannerisms, gestures, and body language. Developing a sense of the person's communication style with familiar topics will be a major advantage once the discussion shifts to information that the customer shares about herself or himself which the employment specialist may not be aware of and does not want to miss. Understanding the individual's communication system will also allow the employment specialist to determine the best means of asking, responding, or speaking in a way that is meaningful for the customer.

Under ideal conditions, the employment specialist should set up a situation such as going to a baseball game, to the mall, or other identified favorite activity. Actually engaging in the activity will stimulate more conversation and trust than simply talking about what the person likes to do. In addition, the

employment specialist can begin to informally assess the customer's gifts and skills within a community environment.

### **Sarah's Case Study Example**

Sarah and her employment specialist decided to meet at the mall's food court near Sarah's home. Prior to the meeting, the employment specialist went to the mall and made a list of skills that he might observe her completing during their visit. The employment specialist also realized that visiting the mall may provide information on Sarah's leisure interests that could stimulate ideas for jobs. The following table provides a sample of some of the items on his list.

<b>INFORMAL OBSERVATION CHECKLIST</b>	
<b>■ Transportation &amp; Safety</b>	
1.	How does Sarah travel to the mall (bus, special transportation, parent, friend)?
2.	Is she dropped off at the entrance or can she find her way to the door through the parking lot?
3.	Does she watch for cars?
<b>■ Mobility</b>	
1.	Does Sarah open the mall door and maneuver her power chair through the door?
2.	Is she able to maneuver around the chairs and tables in the food court?
3.	Can she move through the mall without bumping into people, merchandise, or other barriers?
	(continued)

### **■ Visiting a Store**

1. What store does Sarah choose to visit?
2. Can she find her way to the store?
3. Can she "window" shop, or does she want to spend money?

### **■ Purchasing a Snack**

1. Which food stand does Sarah select? What are her food choices?
2. How does she communicate with the server?
3. Does she buy a snack based on how much money she has? Does she know how much change to expect?
4. Can she physically manipulate the money?

### **■ Eating the Snack**

1. How does Sarah get her food to the table?
2. Does she need any assistance with the food containers or eating?
3. Who initiates conversation?
4. What topics are discussed?

### **Conduct an Initial Interview**

The purpose of an initial interview must be explained fully at the time of the appointment as well as during the initial few minutes of the meeting. Some people may not know what supported employment is, the role of the employment specialist, or why this meeting is taking place. As most would attest, it is difficult to respond to questions and initiate important information if you are confused or unsure of what someone will do with what you tell them.

Describe the employment specialist's role; describe what the customer can expect to

accomplish with support; and why it is important to get to know the person before getting him or her a job. If the employment specialist explains that the information will not be used to exclude the person but to find that perfect “niche” in the job market, time will be well spent setting the stage for a rich and valuable information exchange. Sharing materials and resources about supported employment and the organization can further explain and clarify what the employment specialist is saying and provide an easy reference after the meeting is over.

Similarly, the employment specialist should not rely on one method of asking questions, rather present the options in a variety of ways. For example, ask yes or no questions, phrase as multiple choice, provide true/false alternatives, present open-ended opportunities, and repeat answers back to the customer for verification. An individual may answer yes to every question, always choose the last response, or always agree with the false selection. This may not be the customer's real choice. Instead, the answer may be what the individual is familiar with, a reflection of his or her skill level, or the only choice that the customer remembers when the options are presented. The employment specialist can determine the individual's response pattern by asking questions about a subject that he or she knows the answer to and rephrasing and repeating the question several times to see what type of questioning format is the easiest and most effective for the customer's particular style. Examples of types of questions important to explore are listed in the following table. Remember that a customer's advocate,

friend,

or family member also may be able to provide additional information in these areas if the customer has a difficult time making her or his wants and desires known.

### **IMPORTANT QUESTIONS TO ASK THE CUSTOMER**

- **What do you like to do?**  
(interests, preferences)
- **What skills do you have?**  
(talents, gifts, abilities, education)
- **What experiences have you had?**  
(employment, volunteer, training, personal development)
- **What work conditions would you like to have?**  
(hours/schedule, job duties, work environment, supervision)
- **What financial and non-monetary benefits do you need or want?**  
(wages, health insurance, vacation, personal time, sick time)
- **What kind of social environment would you like?**  
(co-workers, opportunities for socialization, lunch/breaks)
- **What type of services do you need?**  
(case management, independent living, employment, education)
- **What types of supports do you need or want?**  
(personal, workplace, community)
- **What type of job would you like?**  
(type of work, location, size of company, advancement)
- **What are your career/life goals?**  
(employment, living arrangements, leisure activities, relationships)

*The Individual Supports Assessment Form* located in the Appendix of this chapter provides a useful guide for the employment specialist in asking questions or for the customer and his or her family member(s) to complete on their own. Most individuals function on a daily basis with a multitude of supports that they rely on in their everyday lives. Because these routines and supports are so familiar, they are often taken for granted and not offered as pertinent information. For instance, if a member of the church drives the individual to the YMCA several days a week, perhaps he would also drive him to work. A form such as the one provided in the appendix of this chapter can trigger the recollection of valuable information so that no support or indication of preference is overlooked.

Before the end of the meeting, ask for questions and discuss what next steps can be anticipated. Make sure that contact information has been exchanged and each person's preferences for communicating with each other have been discussed. One idea is to describe ways that information thought of after the meeting can be recorded so as not to be forgotten before the next conversation. For example, a great idea for a job noticed while passing by in the car with one's parents is likely to be over-looked if a means of recalling or jotting it down are not explored and pre-arranged.

### **Customer-Driven Support Teams**

Many supported employment customers are beginning to use support teams to assist them in identifying a career path. This has been referred to in the literature as a "Circle of



Support" or "Circle of Friends" (Falvey, Forest, Pearpoint, Rosenberg, 1993; Perske, 1989). This chapter will refer to this group of individuals as a "customer-driven support team."

Typically, the team is made up of friends, family, professionals, and any other persons involved in the customer's life (O'Brien & Lovett, 1992; Pearpoint, O'Brien, & Forest, 1993). A supported employment team may include the customer, her or his employment specialist, vocational rehabilitation counselor, case worker, friends and family members, and so forth. It is important to remember that teams consist only of those individuals selected by the customer. While an employment specialist may feel that a particular person should participate, he or she is not included if this is the wish of the customer.

The customer-driven support team can use any number of person-centered approaches to assist the customer in identifying her/his employment interests and strengths. These strategies have been referred to as "personal futures planning", "lifestyle planning", "MAPS", and "PATH". Typically, a team meets to explore what the individual wants his or her future to be like. Planning sessions provide a forum for everyone to brainstorm and share their ideas and expertise to formulate a blueprint for making the customer's dreams a reality. Finding out what the individual would like to do, remembering that she or he may not be able to articulate specific careers, offering suggestions of jobs in that area, and determining whatever it takes for him or her to be able to pursue these interests and achieve the

greatest degree of satisfaction is just one of the many major accomplishments resulting from a customer-driven approach to services.

### **Identifying the Career Path**

Critical to implementing a person-centered philosophy is the concept of encouraging customers to "dream" about their futures. Professionals cannot make judgements about a customer's choices or career path. During one meeting, a team member almost stopped the "dreaming" process by telling the customer that his goals for the future were unrealistic. The customer was dreaming about being a lawyer or working in a bank. However, as the meeting progressed, the team realized that the customer had this dream, because he wanted to work in an office, wear a suit or nice clothes, and be around professional people. Typically, behind every dream is important information that will direct the customer and her/his team towards meaningful goals.

### **MAPS as a Planning Tool**

Making Action Plans (MAPS) is one person-centered tool that has been used to assist individuals in planning their futures (Falvey et al., 1993). This is a facilitated process in which a facilitator and recorder work with an individual and his/her team to identify the person's gifts and strengths. There are eight key questions that are addressed during a MAPS meeting. Usually, these questions are answered in order, but a group may choose to conduct a meeting differently based on the customer's needs.

Participants at the meeting are selected by the customer who are willing and able to assist in identifying the customer's dreams, interests, and support needs. As previously stated, team meetings can be held anywhere, but the room used should be comfortable and provide a relaxed atmosphere for planning. Meeting at the supported employment agency is not recommended, unless this is specifically the choice of the customer. The eight questions that form the structure for the MAPS process are listed in the following table.

<b>MAPS AS A PLANNING TOOL</b>	
<b>Question #1:</b>	What is a MAP?
<b>Questions #2:</b>	What is the person's history or story?
<b>Question #3:</b>	What are the person's dreams?
<b>Question #4:</b>	What are the person's nightmares?
<b>Question #5:</b>	Who is the person?
<b>Questions #6:</b>	What are the person's strengths, gifts, and talents?
<b>Question #7:</b>	What does the person need?
<b>Question #8:</b>	What is the plan of action?

(Forest & Pearpoint, 1992)

The key to successfully completing a MAPS is to have a positive approach to the process. The individual's gifts and talents should be highlighted, and she or he should

never be described in terms of a disability label or problem. If the customer is challenged by a specific issue, then the team needs to state this in terms of the person's support needs.

The "nightmare" question allows the group to think about negative events that may happen. These nightmares also can provide some valuable insight into job characteristics that should be avoided. For instance, if a customer describes his/her nightmare in terms of never having any friends, this is a cue to avoid jobs with limited social interactions.

Question number 7 asks the customer and her/his team members to consider what the customer will need in terms of people and resources to make his/her dream a reality. During the discussion of this question, the customer may begin to identify specific individuals who have not been invited to the meeting as key implementers in the plan. For instance, if the dream is to become employed using supported employment and the rehabilitation counselor is not present, the customer may realize that the counselor needs an invitation to become a team member.

Question 7 leads nicely into question 8 which asks the customer and team to identify a plan of action. The customer and team members will need to identify who will do what and when (Falvey et al., 1993). The following is a list of sample items off Susan's plan of action.

- Janice, a family friend, will assist Susan in getting a new hairstyle for work that she can take care of independently before 6-11.
- Susan and Bill, the employment specialist, will look through the classified section of

the paper weekly to discuss job possibilities. Bill will update Susan during these weekly discussions on all job leads that he identifies.

- Susan will talk with her case manager and schedule a meeting to discuss a new augmentative communication device by 6-15.
- Chuck, a peer mentor, will assist Susan in obtaining information on adult literacy by 7-1.

### **PATH as a Planning Tool**

The Planning Alternative Tomorrows with Hope (PATH) process can be used to identify each customer's dreams and goals for employment, specify accomplishments which will occur in a one year time period, and establish intermediate three month, one month, and one week objectives and activities toward meeting the customer's career goal. Essentially, PATH developed from the MAPS process and was designed to put into place a plan of action for the focus person (Pearpoint, O'Brien, Forest, (1995). Literally, the process can identify an employment "path" for customers to pursue.

A PATH is led by a group facilitator and a graphic recorder. These two individuals are preferably "neutral" and not members of the customer's support team. They guide a brainstorming meeting by recording the discussion pictorially. Eight steps are completed and must be discussed in order to preserve the integrity of the process. The following table lists these steps.

### **PATH: PLANNING ALTERNATIVE TOMORROWS WITH HOPE**

- |                |  |
|----------------|--|
| <b>Step 1:</b> | The North Star - The Dream             |
| <b>Step 2:</b> | Sensing The Goal - Positive & Possible |
| <b>Step 3:</b> | Grounding in the Now                   |
| <b>Step 4:</b> | Who Do We Enroll?                      |
| <b>Step 5:</b> | Recognizing Ways to Build Strength     |
| <b>Step 6:</b> | Charting Actions for the Next 3 Months |
| <b>Step 7:</b> | Planning the Next Month's Work         |
| <b>Step 8:</b> | Committing to the Next Step            |

(Pearpoint, O'Brien, & Forest, 1995)

The facilitator's responsibility is to assist the team in addressing each of these eight steps of the PATH. The customer should be encouraged to "dream" what her/his future looks like without any restrictions. Once this has occurred, the customer can talk about the goals that have been accomplished during a specified time period. This could be one year, six months, or any other length of time that is just past what the person can be predict. The facilitator encourages the customer to think about these events as if they have already happened. Goals identified in this step should be positive and possible (Pearpoint et al., 1995). If the customer has difficulty communicating or is unable to think of events in the

future, the facilitator should encourage the team members to assist by describing things that they feel have happened. Of course, these career goals or events should always be verified by the customer, before they are placed on the person's PATH.

The next steps require the customer to think about how he/she feels now, who needs to assist in the PATH, and how the customer builds strength. Obviously, identifying individuals to enroll in the support team is a critical step towards assisting a customer in meeting his/her career goals. For instance, one customer realized that she ~~would need to get~~ her personal care attendants enrolled in order to successfully get dressed and be prepared to go to work everyday in a timely fashion. She also identified that she builds strength by going to bed every night by 10:00 p.m. and not getting out of bed before 8:00 a.m.. Since it requires a minimum of 1½ hours for the customer to get dressed, the employment specialist learned that working before 10:30 in the morning would not be feasible for this particular customer.

The final three steps of the PATH ask the customer and his/her support team to actually set actions for the next few months. Again, the facilitator asks the group to talk in the past tense. Such as, "I have opened a checking account." "I have participated in three situational assessments to identify the type of career that I would like to pursue." The customer and the support team members should be specific about who does what and when it will be accomplished. The employment specialist may be the logical person to assist the customer

in monitoring the progress that occurs towards meeting the customer's career path.

The reader is encouraged to study the materials referenced in this section and others before implementing MAPS or PATH. There are several videotapes available through Inclusion Press which also are excellent resources. The following is an excerpt from one customer's PATH. The appendix of this chapter provides a pictorial representation of this work.

### **Sample PATH: Career Planning Activities for One Customer**

#### ***Career Dream for the Future***

##### **A job where I...**

- can help others.
- can work around people.
- work with animals (e.g, pet store, veterinarian's office, boarding facility, park, etc.); or
- work with flowers such as at a florist; or
- work in a department store.

##### ***One Year Goals***

##### **I have..**

- selected a job, and I am working!
- opened a checking and savings account.
- bought new clothes with earnings.
- joined a woman's group such as the Garden Club.

##### **I am...**

- earning enough money to pay my own bills (e.g., telephone bill).
- making new friends.
- going out into the community independently (e.g, attending concerts on own, going shopping, going out to dinner, etc.).

### ***Three Months Goals and Objectives***

#### **I have...**

- completed a situational assessment at three different work sites based on my specific interests (e.g., pet store, florist, department store).
- narrowed my job interests and choices (hopefully identified a job!).
- gone on 3-4 job interviews.
- identified where I want to go and used the accessible bus system at least 3 times by myself.
- gone to a concert with friends at least once without assistance!
- gone out to dinner with a friend at least once without assistance!

### ***One Month Goals and Objectives***

#### **I have...**

- picked out my interview outfit.
- identified the sites for my situational assessments.
- ridden the accessible bus system with my mentor at least once a week.
- attended regularly scheduled support group meetings.

### ***Next Week's Activities***

#### **I will...**

- buy a day planner to keep up with my new schedule.
- talk with my personal care nurses about my job goals.
- visit at least one job site to begin narrowing my choices for situational assessment.
- review the want ads to get an idea about available jobs.
- role play having an interview with my mentor.
- attend a support group with other project customers.

## **CONDUCTING FUNCTIONAL ASSESSMENTS**

It is important to remember that the reason for conducting an assessment is to determine a customer's skills and interests, learning style, behavioral characteristics, and support needs so that employment and support decisions can be made with the person which accurately reflect what she or he wants and needs. The most useful information for an individual with a severe disability is obtained when a functional assessment approach guides all aspects of the process including the activities that are conducted, the methods that are used, and the manner with which they are interpreted.

A functional assessment is not performed to "screen out" an individual from employment or deny access to a desired activity; rather, an assessment should be conducted to determine the level and intensity of support that the customer will need in order to achieve maximum independence. It is characterized by a reliance on obtaining information from a variety of sources, focusing on actual behaviors in real environments where they occur, and documenting the information in behavioral terms without value judgments.

Looking at the functional abilities of the customer in the context of what is required by the environment where the skill is to be performed, allows an accurate assessment to be conducted under the natural circumstances and cues of the work environment where the skill will occur. Any gaps between what is required

by the job site and what the worker is able to do can be lessened with the application of instructional techniques and individualized supports that meet the customer's specific needs. Often, many of the gaps are resolved through negotiations with the employer and specific job carving during job development that eliminate the need altogether. Other times, assistive technology, compensatory strategies, rehabilitation engineering, personal assistant services, or behavioral training techniques will reduce the difference between what is required and what the individual is able to do.

However, if assessments are written in a way to screen someone from receiving services, then the chance to explore and apply these strategies will go undetected. For example, if the assessment indicates a stamina issue requiring the customer to build up endurance before becoming employed, then little information is relayed to the employment specialist to assist with employment decisions. Two very different pictures and support needs are suggested by the following functional information: 1) Paul has a severe heart condition requiring a sit-down job or one that is not strenuous and offers frequent breaks throughout the shift; 2) Barbara has no physical limitations but has been sitting at home for an extended period of time and works for one hour before saying she is tired and requesting a break. Any information about an individual can be very misleading if not considered within the context of how it was obtained and perhaps more importantly, how it was interpreted.

### **Individualized and Comprehensive**

A thorough assessment process offers the opportunity to develop an image of the entire person without overlooking small details which may significantly affect the choices someone makes regarding his or her employment situation. This involves the gathering of information from a variety of sources including: talking with the individual, meeting with the family, conducting community-based assessments, observing the individual in multiple environments, reviewing formal records, and any other activities that are relevant to that person's life. Even though the methods of conducting assessments are similar for all individuals, the manner in which they are implemented may vary based on what is important for that person.

For example, observing in multiple environments may mean home and school for one customer, the workshop and community volunteer experience for another, or home and paid work situation for someone else. Other customers may offer additional opportunities that are equally important in their life, such as going out for coffee, grocery shopping, working on the computer, or collecting recycling products from their home. A good rule of thumb is to keep in mind the guiding principles of assessment, plan on completing the specific strategies outlined for developing a customer profile, and remain open and flexible enough to make changes as directed by the customer.

### **Observe in Multiple Environments**

Everyone acts differently depending upon the situation they are in and how familiar

they are with the environment. For example, quite a different impression is presented in an interview with an employer than at the company sponsored softball game. Similarly, someone will appear very different in a workshop setting surrounded by other individuals with a disability than she or he would in a competitive business setting with other persons who do not have disabilities. It is important to arrange to visit the customer in a variety of different places and situations including the activities and settings he or she frequently participates in. Previously in this chapter, suggestions were made for assessing the customer's skills and interests by getting to know the person in an environment of his/her choice. These can include the individual's home; the local community; his or her school; a volunteer job, vocational training site; or leisure/recreational activity.

Ask the customer what kinds of things she or he is doing and if it would be alright to visit and observe him or her in that setting. Contact the person in charge, such as the teacher, employer, trainer, or staff member, and schedule a time that the observation will not interfere but will also will provide an opportunity to observe the customer's typical routines and activities. The employment specialist should explain why he/she is coming as well as to request time to speak with the representative who knows the customer best to gain additional insight into his or her work interests and attributes. While the employment specialist is there, be sure to pay attention to: 1) specific tasks (e.g., delivering mail, bagging groceries,

answering a telephone), 2) particular skills (e.g., discriminating among objects, orienting around the area, using a watch), 3) physical abilities (e.g. strength, mobility, agility), 4) per-sonality characteristics (e.g., shy, personable, tolerance for stress), 5) environmental condi-tions (e.g., noise, temperature, congestion), 6) interpersonal relationships (e.g., friendships, proximity, communication), and likes and dis-likes (e.g., location, schedule, nature of activity). This is a good opportunity to talk with the customer and have him or her describe and show what she or he is doing.

## COMMUNITY-BASED ASSESSMENTS

Two methods of conducting functional assessment activities include situational and community assessments. Both involve having the customer take part in actual events that occur in business settings and other community environments. In this way, an individual can indicate what he or she likes by visiting or participating in the actual environments where the events occur. This allows someone to express preferences that may not be communicated, exhibit abilities that may go undetected, and make choices from experiences that may never be known.

### **Situational Assessments**

A situational assessment provides a customer with the opportunity to perform job tasks in real work environments in the community (Moon, Inge, Wehman, Brooke, & Barcus, 1990). Usually, a situational assessment is

conducted for a four hour period in two to three different types of jobs in the community which are representative of the local labor market. However, a general guideline for the length of an assessment is that it should reflect the customer's future work day. If the individual wants to work full time, then he or she should participate in assessments that reflect a full day of work.

Any business can be a potential site; identified from any number of experiences, contacts, or resources that the employment specialist is aware of (e.g. past employment, personal contacts, job development, previous supported employment setting, newspaper, telephone book, and so forth). However, the sites selected for any specific customer depends on the choices of the individual. For instance, one customer during her PATH meeting identified that she thought a job at a pet store or florist may be something that she would like. The employment specialist then set up two situational assessments in the community to give her the opportunity to see if these were possible career paths for the customer.

If the customer is unable to identify specific ideas about a career path, then situational assessments can be even more valuable to the individual and the employment specialist. A variety of job types should be explored, and the customer's reaction to each recorded to compare which may be the most appropriate and most preferred job choice. It is important to note that it is not necessarily assumed that a customer will choose to work in one of the types of businesses where the situational

assessments are conducted, but an opportunity is provided to assist the customer with determining the career goal, work environment, job characteristics, or business that she or he might like.

For example, one individual who chose to complete a laundry assessment began crying almost immediately and refused to fold the linens. The employment specialist quickly asked if she would like to do housekeeping, which she readily agreed to. The customer did an excellent job vacuuming, making the bed, and cleaning the room very quickly and somewhat independently. At first glance, it would appear that she loved to clean and would eagerly accept a job involving cleaning, however, she and her parents both confirmed that she hated doing any type of cleaning duties. After spending more time together and participating in additional assessment activities, it was discovered that she did not like the laundry, because it was hot, loud, and the stack of towels never ended. Whereas, in the hotel room the tasks were well-defined, there was no noise, no other people were around, and the room was cool. In addition to identifying some of the aspects of the job that the customer would be interested in, and those she would not like, the use of compensatory strategies that would allow her to self-monitor without co-worker prompting and which would give her closure at the completion of a task were identified and put into place at her job. Incidentally, her job choice, a lobby attendant at a fast food restaurant, was decided for all of the reasons cited above from the assessments as



well as the fact that the majority of her friends were working there.

Situational assessments are useful in determining the type of employment services a customer can benefit from and the level and intensity of supports she or he will need. Observing an individual performing real work in multiple environments provides an indication of her or his work characteristics, interests, skills, abilities, learning style, and support needs. In addition, a situational assessment offers the individual an opportunity to witness different types of jobs and their requirements first-hand to assist him or her with making a job choice. A situational assessment form is located in the appendix of this chapter; however, programs are encouraged to develop their own forms based on the needs of their customers.

### **Setting Up Assessment Sites**

Most employers are more than willing to participate in this type of activity. If an agency already has a relationship with the employer then probably the employment specialist will have an idea of the employer's receptivity, the positions to be targeted, and the general logistical arrangements. If the employment specialist is contacting a business for the first time in order to arrange a situational assessment, much of the information gathering can be completed at the same time that the employment specialist is requesting the employer's participation.

When talking with the employer it is very important to be clear about what the

supported employment agency would like. Communicate in a professional manner using business terminology and avoid professional jargon. Most employers are not going to be familiar with situational or community-based assessment as this is not the typical practice when hiring most employees. However, employers understand the concept of hiring a good worker who can do the job, really wants to work there, and will be a loyal, reliable employee. Explaining that the best way to help someone find a job that they really want and to know how to support the individual and employer is to "try out" some brief work experiences is typically well-received. Tell the employer that the employment specialist would like to select one or more positions within the company, learn how to do them, select times that the presence of two additional people wouldn't be disruptive to the regular workflow. Find out her or his needs, scheduling preferences, and capacity for conducting multiple assessments over time.

Once agreement has been reached, several steps are suggested which have been found to be helpful. First, observe the different jobs being performed and decide which ones are representative of jobs or job characteristics in the community and offer variety in terms of work tasks, environments, demands, and employees. Second, talk over the identified job tasks with the employer, assess his or her receptivity to what has been chosen, and negotiate among all of the options presented. Third, observe the job being performed and write a task analysis for completing each duty

while noting any other important aspects of the work area. Fourth, verify knowledge of the job, the employer's expectations, and the rules which employees of the company must follow by reviewing what is known with the employer, front line supervisor, lead co-worker or any other designated representative. Fifth, make the scheduling arrangements including who will participate, names of the trainers, method of transportation, hours of the assessment, what clothing must be worn, job duties to be performed, rules of the work area, and critical "tips" to remember. Sixth, inform the individual and any other persons who may be affected by the assessment, such as his or her family, teacher at school, residential staff, vocational trainer, day program personnel, or others. Don't leave anything to chance which could potentially jeopardize the present assessment and participants as well as the long-term arrangement with the employer. Seventh, communicate with the employer about conducting assessments over time based upon the number of persons to be served and the projected period in which job development activities are anticipated, such as every four or six months. Having everything prepared allows additional assessments to be conducted on a regular basis with just a telephone call to con-firm with the employer and verify the previous arrangements that have been made.

Two issues frequently raised by agencies and employers concern liability and labor laws (Inge & Wehman, 1993). It is important to be well-versed in what these requirements are and the appropriate response

to each of these questions. The U.S. Department of Labor has established specific criteria, which if followed, will not constitute an employment relationship in violation of the Fair Labor Standards Act. While there are numerous resources available which outline these criteria (Inge & Wehman, 1993) it is highly recommended that a contact be made with the Department of Labor for the information and any new guidelines which may affect your particular situation. Liability issues can be explained by describing the insurances that cover the customer and employment specialist and the responsibilities of all parties. For the employment specialist, her or his worker's compensation insurance covers him or her on the job site since that is part of the position's job description. The customer is covered by his or her private insurance or Medicaid/Medicare benefits. If it is a school situation and community-based training/assessments are included in the student's educational program then the school's liability insurance covers the student at the business. Finally, if accident or injury occurs due to negligence of the employer or circumstances beyond her or his control then the company's insurance would be liable as for the other employees, the public, or anyone else affected by the incident.

### **Community Assessment**

Community assessments have been described earlier in this chapter. As previously mentioned, a community assessment provides an excellent opportunity to become familiar with the local area where the individual lives

both to identify potential support resources and to determine job preferences. Additionally, it allows the employment specialist the chance to identify businesses to target for job development. For example, one person said he wanted a job with computers and office equipment and asked to see one business which was very formal in its appearance with employees dressed in a suit and tie and very little customer traffic. Another location was identified to allow him to see several similar types of businesses, however, this one was staffed by persons his own age, dressed casually, with trendy music playing in the background. After the first company, the individual thought he had chosen the wrong type of work and said he wanted to do something else; however after visiting the second business, he quickly changed his mind and eagerly pursued a job in an office supply store with similar features. For customers who have never worked or who have had limited experiences, making choices about a job or the features of a workplace often can be difficult. The community assessment opens up new and old environments to explore and observe thereby expanding the wealth of possibilities from which they will be making a selection.

The Situational Assessment Summary Form (Moon et al., 1990) located at the end of the chapter is a useful tool for recording observations and impressions noticed during the situational and community assessments. The form offers a listing of 30 characteristics found to be important when assisting someone with employment. Five spaces are provided

beside each item to allow summaries of information from multiple observations and interviews. The “other” column is often used to summarize observations in another environment, community assessment activity, or additional interviews with key persons. The third situational assessment column can be modified to describe a community assessment or other activity if only two situational assessments are conducted. It is important to write down the functional behavior that is observed without adding interpretations of what is recorded. However, additional comments which explain the context or further clarify the information which may be useful for finding the right job are certainly encouraged. If multiple employment specialists are participating, the lead person should complete the form first and pass it on to the other(s) to add their comments or impressions.

## **F**AMILY SUPPORT AND INVOLVEMENT

For some individuals, parents or a family member may not be involved in their life while others may have very close ties. It must be determined by the customer based upon his or her relationships with other persons as to who will be involved in the assessment process. What is important to consider is that in regards to going to work, the individual's entire life, including family members, must be an essential part since everyone in that family unit is likely to be affected. Families have their own lives, schedules, and priorities, and while going to work is a number one concern, the reality of day-to-day life and circumstances

outside of work are major factors for them. Finding out their expectations, dreams, and life routines are a critical element that cannot be ignored. Often family members are viewed as not wanting their son or daughter to go to work and therefore, labeled as resistant and not supportive. The reality is that they may never have considered employment before because all their life they have been told that their son or daughter won't work. Perhaps, they are concerned about their family member being able to perform the job, fitting in with the other co-workers, the permanency of the position, transportation, loss of Medicaid/Medicare, or safety. It is important to remember that many of these family members may never have heard about supported employment or the employment specialist and are expressing concerns that are quite valid particularly under traditional vocational rehabilitation models. They may present a very different picture if once informed of the information which employment specialists have to share.

Be prepared to respond to family member concerns regardless of whether they are spoken or not. The truth of the matter is that parents may not know what to ask or may be interested but not want to jeopardize their daughter or son's chances of going to work or may feel they know the answer but have been misinformed in the past. It is important for you to share information in a way they can understand so that an informed choice can be made. Many of the issues are addressed by simply describing the job coaches' role and explaining

what he or she is responsible for. For example, throughout the entire process, the ability to do the job, getting along with co-workers, safety, and responding to supervision can be alleviated by knowing what the employment specialist will be doing. Other issues, such as scheduling, hours, transportation, after work activities, alternative arrangements should the job not work out, and the responsibilities of the family, can be addressed during the assessment process by finding out what the family would like and the range of options that would be satisfactory for them. Finally, one of the greatest concerns, namely health insurance, should be discussed in depth with estimated calculations completed indicating the effect work would have on benefits, arranging and/or accompanying on a visit to Social Security and Medicaid/Medicare in order to accurately determine the impact of employment, and finding out their needs to be considered during job development (e.g., full or part time employment, company-sponsored medical insurance).

Because the family is so important both in assisting the customer with employment as well as being a tremendous resource of support options that may be available, including them in the supported employment process and encouraging their involvement are crucial. Just as with the customer, take time to get to know the family by visiting them at home on several occasions. What the employment specialist is presenting to the family can be overwhelming not to mention that some very important decisions are being asked of them all of which cannot be expected to occur with just one

meeting. Take time to build a relationship by sharing information, describing who the employment specialist and organization are, encouraging them to share their dreams, finding out their expectations, asking their opinions, and exploring the resources they rely on. If family members seem hesitant, slow down and give them time to think. Keep the channels of communication open by telephone and additional meetings to allow opportunities for questions and more detailed explanations. An excellent way to foster family support is to arrange linkages with other parents whose sons or daughters are working and can describe firsthand what their experiences were like and the benefits they encountered. Another suggestion is to conduct a parent resource night with written materials, slides and/or videos, speakers who are individuals and family members involved with supported employment, presentations by other agency representatives, and a period for questions and answers.

## **D** EVELOP A CUSTOMER PROFILE

One of the challenges of the assessment process is pulling together all of the information which has been obtained from the variety of sources. It is not uncommon for different information gathering techniques to yield differing information about the same thing. While this can be confusing, it is extremely helpful to be able to paint a larger picture of who the customer is and what her or his range of abilities, interests, and preferences really are. The key to making this information useful for the job development, job-site training, and long-term

support services that follow is to synthesize the information in an easy reference format. In addition, extrapolating pertinent information and highlighting it in a functional resume offers a tool for employment specialists and customers to use for their job searches and career advancement efforts.

### **Synthesize Assessment Information**

Once all of the assessment activities have been completed, the employment specialist should have a general sense of who the customer is, what kind of job he or she would like, and the types of supports that may be needed. Summarizing the information onto the Customer Profile Form will help to make it more manageable when approaching a job and assisting the customer with making employment decisions. This form, located at the end of this chapter, contains 28 questions that have been found to be critical elements to consider from a customer and employer perspective. This form includes many of the same items that were previously thought about on the Situational Assessment Summary Form. The Customer Profile Form allows you to select one response for each item that best matches what the customer does under typical circumstances. If opposite extremes are witnessed under certain conditions, it is important to note them in the comment section but really does a disservice to everyone if indicated as the customer's primary way of doing something.

For example, a person who lifts 10 to 20 pounds regularly (item 3) while working at

a job for three or four hours and during that time was observed lifting 50 pounds with a great deal of exertion on two separate instances, then selecting strong will give the impression that the individual can lift and carry 50 pounds or more throughout her or his work shift. However, checking fair, and writing in the comment section that the person is capable of lifting up to 50 pounds but not on a continuous basis opens up many more opportunities within jobs requiring strength without putting the customer in a situation that exceeds his or her physical abilities. Similarly, a very different picture is presented if under transportation (item 2) it is checked that the family would drive when, in reality, the family only will transport in an emergency or back-up situation.

A similar Job Screening Form described in the Job Development Chapter includes the same items focusing on the requirements of a job to assist with making training and support decisions essential for bridging the gap between the two. It is important to remember that this synopsis is completed to assist with finding a job that matches what the individual would like. Adding or eliminating bits of information in order to alter the impression of the individual as being more or less capable is not the purpose of the form. Since no judgments are being made and no one is at risk of being excluded as a result of the information obtained, the need to go beyond behaviorally describing the individual's skills and characteristics is not necessary and actually poses a disadvantage.

## **F**UNCTIONAL RESUME

Resumes are the means by which many people and employers get a job or hire their workers. Often, supported employment customers do not compete well on paper as represented on a job application or standard resume format. However, exploring the paid and unpaid work experiences and other work-related activities that the customer has been involved with and translating these into language an employer understands can significantly boost their advantage in the labor market. For example, special skills, talents, work behaviors, use of equipment, and exposure to different job duties can be presented in a way that lets the employer know the individual has had some vocational experience and offers many qualities to the business despite the fact that she or he may never have held a paid job before. A worksheet is attached for the customer and if desired, his or her family, to use, to brainstorm and remember activities and experiences that the person may have had but never considered to be relevant to becoming employed. It is a good idea to present this to them during an initial visit so they can begin thinking of information to include. Once the worksheet is completed, the employment specialist can word the information in a way that would be meaningful to an employer. An example of a completed functional resume is located in the Appendix of this chapter. This is useful to give to employers by the individual looking for a job, the employment specialist during job development, or by attaching it to an application or enclosing it with a cover letter

and mailing or delivering them to an employer.

### **Pulling it All Together**

Michael is 25 years old and has cerebral palsy and mental retardation. He has limited use of his right hand, poor vision, and unclear speech. Michael attended a special education center and finished school three years ago. He participated in several work experiences while in school, some of which were paid. Michael worked in the school greenhouse for one year, in the school cafeteria for four months, and in the school library for two months. He obtained a competitive job in the garden center at a department store during his last year of school and was laid off after three weeks. Since Michael finished school, he has been sitting home watching television and video movies. He wants to work and thinks that janitorial work in an electronics store would be fun.

### **Vocational Evaluation Report**

Michael was able to follow verbal, demonstrated, and pictorial directions. Instructions needed to be very specific and repeated each time the task was completed. Michael tried the following work samples: engine service, information processing, mail sorting, medical service, and assembly. He was observed to have a positive work attitude, perseverance, ability to work with others, acceptance of constructive criticism, an understanding of safety rules, adjustment to repetitive tasks, and care of equipment and materials. The following negative work behaviors were

noted: slow work rate, poor accuracy, an inability to adapt to change, and a frustrated reaction to supervision. It is recommended that Michael receive work adjustment training with the goal of supported employment in the area of food service, office worker, or custodian.

### **Medical Report**

Michael has spastic right hemiplegia resulting in flexion contractures of the right wrist, hip, and knee. The left arm and leg have fair muscle strength. He can walk independently. Michael cannot lift heavy objects, walk long distances, twist, stoop, or climb.

### **School Records**

Michael gets along with everyone, is very polite, and usually goes along with whatever his teachers or peers say. He is an excellent worker, very motivated, and gets the work done. Michael learned how to do the greenhouse job and was able to work independently with minimal supervision and reinforcement after two months of intensive training. He likes to work alone and gets very frustrated if he cannot complete a task without assistance. He will try very hard to figure out a way to do something rather than ask someone for help. He did not perform as well in the kitchen or library jobs with frequent off-task behavior noted, however, even though he worked slowly, he persevered until the job was finished.

### **Home Visit**

Michael and his mother were extremely excited and eager for him to start work. His

mother was very supportive and offered to drive Michael or help in any way she could. She said Michael helped around the house with light cleaning and taking out the trash but only after repeated requests. Michael said he watched TV and taped movies on the VCR all day. He said he wanted to work and would do anything. Michael recently had knee surgery, but both he and his mother did not feel that he had any physical limitations that would interfere with work. Although, his mother did express concern that he would need frequent breaks to rest throughout his work day. His mother is very worried about Michael's inability to read or understand math. Michael says he wants to work and will do anything.

### **Situational Assessments**

Michael participated in two situational assessments; one as a bagger at a grocery store and the other as a janitor in a department store. In both situations, Michael initiated working, insisting on doing the jobs his way even if it was incorrect, the employment specialist tried to show him the correct way to do the tasks. Michael was polite to the customers and greeted them appropriately. If a customer could not understand Michael and asked him to repeat what he said, Michael would throw down what he was working on and walk away. He lifted bags in the grocery store and loaded them into cars with no physical difficulties. He worked for three hours in the grocery store before requesting a break to get a soda.

When Michael was dusting and vacuuming the men's and stereo departments of the

store, he asked to rest often, would stop working to look around, and kept asking what he should do next. Michael said he liked bagging groceries but liked being in the department store better. He said he just wants to work and get away from his mother.

### **Community Assessment**

Michael eagerly went with the employment specialist initiating conversations about his neighborhood. He pointed out the video store where he walks to get movies, the restaurant that he and his family go to, and his friend's house whom he likes to listen to music with. Michael sang and moved with the music on the car radio frequently requesting for it to be turned up. When asked what his favorite activity was, he quickly said listening to music and watching videos. The employment specialist drove to a mall where a video store, electronics store, and music store were all located. Michael darted to the music store and began pointing out and naming the different artists and types of music. After repeated coaxing, he visited the video store and again shared a great deal of movie trivia explaining the storyline and performers in many of the movies. Michael exhibited a tremendous degree of knowledge and enthusiasm when involved with music and videos that was not evident in any other settings. Michael said he would like to listen to music more at home but



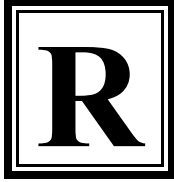
only had a radio and the stations “keep playing the same old thing”.

Based upon the above assessment information, a customer profile is developed to guide the entire supported employment process. A completed Customer Profile Form demonstrates how the varying information, representative of the entire person, can be summarized into a usable format to assist with finding a job that best matches what the individual would like to do and offers the job characteristics she or he is interested in.

## **S**UMMARY

The importance of developing a customer profile cannot be overemphasized or ignored. Without this critical step, it is likely that the entire supported employment process will be affected. Specifically, job development activities must be driven by the customer's support needs and preferences. This can be accomplished by completing a comprehensive customer profile which includes person-centered planning, interviews, observations, review of the customer's records, community-based and situational assessments. In addition, the profile will be important during job-site training, since it specifies the customer's support needs, which will provide information for developing and implementing effective customer support plans.

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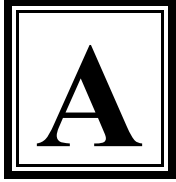
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## **APPENDIX**

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- **Functional Resume Worksheet**
- **Customer Profile for Michael**
- **Customer Profile Form**
- **Situational Assessment Form**
- **Individual Supports Assessment Form**

# Functional Resume Worksheet

<b>Name:</b> _____ <b>Phone:</b> _____ <b>Address:</b> _____																								
<b>I. Job Objective</b>																								
<b>II. Education</b>  <table style="width: 100%; border: none;"> <tr> <td style="border: none; width: 50%; text-align: center;">Major/Program</td> <td style="border: none; width: 50%; text-align: center;">School</td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none; text-align: center;">_____</td> </tr> <tr> <td style="border: none; text-align: center;">Location of School</td> <td style="border: none; text-align: center;">Month/Year</td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none; text-align: center;">_____</td> </tr> </table>	Major/Program	School	_____	_____	Location of School	Month/Year	_____	_____																
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<b>IV. Experience (most recent)</b>  <table style="width: 100%; border: none;"> <tr> <td style="border: none; width: 50%; text-align: center;">Job Title</td> <td style="border: none; width: 50%; text-align: center;">Employer</td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none; text-align: center;">_____</td> </tr> <tr> <td style="border: none; text-align: center;">City</td> <td style="border: none; text-align: center;">State</td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none; text-align: center;">_____</td> </tr> <tr> <td style="border: none; text-align: center;">Years Employed</td> <td style="border: none;"></td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none;"></td> </tr> <tr> <td style="border: none; text-align: center;">Job Title</td> <td style="border: none; text-align: center;">Employer</td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none; text-align: center;">_____</td> </tr> <tr> <td style="border: none; text-align: center;">City</td> <td style="border: none; text-align: center;">State</td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none; text-align: center;">_____</td> </tr> <tr> <td style="border: none; text-align: center;">Years Employed</td> <td style="border: none;"></td> </tr> <tr> <td style="border: none; text-align: center;">_____</td> <td style="border: none;"></td> </tr> </table>	Job Title	Employer	_____	_____	City	State	_____	_____	Years Employed		_____		Job Title	Employer	_____	_____	City	State	_____	_____	Years Employed		_____	
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<b>V. Interests/Hobbies:</b>																								
<b>VI. References (available upon request)</b>																								

# Customer Profile Form

Customer Name: Michael Social Security #: 226-30-1212

Staff Completing Form: Susan Smith I.D. Code: \_\_\_\_\_

Date of Screening (month/day/year): 08 / 26 / 93

Types of Screening: Initial  Ongoing/Employment  Ongoing/Unemployment

Total number of hours per week presently working: 0 Months per year: 0

## General Directions: PLEASE DO NOT LEAVE ANY ITEM UNANSWERED

Indicate the most appropriate response for each item based on observations of the customer and interviews with individual who know the customer (i.e., family members, adult service providers, school personnel, employers).

### 1. Availability: (check Yes or No for each item)

Will work weekends:  Yes  No Will work part-time:  Yes  No  
Will work evenings:  Yes  No Will work full-time:  Yes  No

Specifics/Comments: Dependent on specialized transportation

### 2. Transportation: (check Yes or No for each item)

Transportation available:  Yes  No Family will transport:  Yes  No  
Access to specialized travel services:  Yes  No Provides own transportation (bike, car, walks):  Yes  No  
Lives on bus route:  Yes  No

Specifics/Comments: Mother will transport if possible

### 3. Strength — Lifting and Carrying:

Poor (< 10 lbs)  Fair (10-20 lbs)  Average (30-40 lbs)  Strong (> 50 lbs)

Specifics/Comments: \_\_\_\_\_

### 4. Endurance: (without breaks)

Works < 2 hours  Works 2-3 hours  Works 3-4 hours  Works > 4 hours

Specifics/Comments: Slow, steady pace however.

**5. Orienting:**

Small area only  One room  Several rooms  Building wide  Building & ground

Specifics/Comments: \_\_\_\_\_

**6. Physical mobility:**

Sit/stand in one area  Fair ambulation  Stairs/minor obstacles  Full physical abilities

Specifics/Comments: Limitation right arm, unsteady gait when walking appears to have limited flexibility.

**7. Independent work rate: (no prompts)**

Slow pace  Steady/average pace  Above average/sometimes fast pace  Continual fast pace

Specifics/Comments: Works at a very slow and deliberate pace.

**8. Appearance:**

Unkempt/poor hygiene  Neat/clean but clothing unmatched  
 Unkempt/clean  Neat/clean and clothing matched

Specifics/Comments: \_\_\_\_\_

**9. Communication:**

Uses sounds/gestures  Speaks unclearly  
 Unkempt/clean  Communicates clearly, intelligible to strangers

Specifics/Comments: Sometimes difficult to understand.

**10. Appropriate social interactions:**

Rarely interacts appropriately  Initiates social interactions infrequently  
 Polite, responses appropriate  Initiates social interactions frequently

Specifics/Comments: \_\_\_\_\_

**11. Unusual behavior:**

Many unusual behaviors  Few unusual behaviors  No unusual behaviors

Specifics/Comments: \_\_\_\_\_

**12. Attention to task/perseverance:**

- Frequent prompts required
- Intermittent prompts/high supervision required
- Intermittent prompts/low supervision required
- Infrequent prompts/low supervision required

Specifics/Comments: \_\_\_\_\_

**13. Independent sequencing of job duties:**

- Cannot perform tasks in sequence
- Performs 2-3 tasks in sequence
- Performs 4-6 tasks in sequence
- Performs 7 or more tasks in sequence

Specifics/Comments: Situation dependent.

**14. Initiative/motivation:**

- Always seeks work
- Sometimes volunteers
- Waits for directions
- Avoids next task

Specifics/Comments: \_\_\_\_\_

**15. Adapting to change:**

- Adapts to change
- Adapts to change with great difficulty
- Adapts to change with some difficulty
- Rigid routine required

Specifics/Comments: Appears to accept criticism but becomes easily frustrated w/continued supervisor comments.

**16. Reinforced needs:**

- Frequent required
- Infrequent (weekly sufficient)
- Intermittent (daily) sufficient
- Pay check sufficient

Specifics/Comments: \_\_\_\_\_

**17. Family Support**

- Very supportive of work
- Indifferent about work
- Supportive of work with reservations
- Negative about work

Specifics/Comments: \_\_\_\_\_

**18. Customer's financial situation:**

- Financial ramifications no obstacle
- Reduction of financial aid is a concern
- Requires job with benefits
- Unwilling to give up financial aid

Specifics/Comments: Receives SSI — Mother concerned with potential loss of SSI.

**19. Discrimination skills:**

- Cannot distinguish between work supplies      Distinguishes between work supplies  
 Distinguishes between work supplies with an external cue

Specifics/Comments: \_\_\_\_\_

**20. Time awareness:**

- Unaware of time and clock function      Can tell time to the hour  
 Identifies breaks and lunch      Can tell time in hours and minutes

Specifics/Comments: \_\_\_\_\_

**21. Functional reading:**

- None      Sight words/symbols      Simple reading      Fluent reading

Specifics/Comments: \_\_\_\_\_

**22. Functional math:**

- None      Simple counting      Simple addition/subtraction      Computation skills

Specifics/Comments: Can not make change, will use calculator, very limited math skills.

**23. Independent street crossing:**

- None      Crosses 4 lane street with light  
 Crosses 2 lane street with light      Crosses 4 lane street without light  
 Crosses 2 lane street without light

Specifics/Comments: Slow speed, causes of great concern with mother.

**24. Handling criticism/stress:**

- Resistive/argumentative      Accepts criticism/does not change behavior  
 Withdraws into silence      Accepts criticism/changes behavior

Specifics/Comments: Depends on situation, some inappropriate behavior observed.

**25. Acts/speaks aggressively:**

- Hourly      Daily      Weekly      Monthly      Never

Specifics/Comments: Can be very stubborn.



**26. Travel skills:** (check Yes or No for each item)

Requires bus training	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Uses bus independently/no transfer	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Uses bus independently/makes transfer	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Able to make own travel arrangements	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Specifics/Comments: \_\_\_\_\_

**27. Benefits consume needs:** (check Yes or No for each choice)

0 = None	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
1 = Sick Leave	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
2 = Medical/health benefits	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
3 = Paid vacation/annual leave	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
4 = Dental benefits	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
5 = Employee discounts	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
6 = Free or reduced meals	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
7 = Other (specify): _____		

**28. Check all that customer has performed:**

<input checked="" type="checkbox"/> Bus tables	<input checked="" type="checkbox"/> Sweeping	<input checked="" type="checkbox"/> Dish machine use	<input checked="" type="checkbox"/> Keeping busy
<input type="checkbox"/> Food prep.	<input type="checkbox"/> Assembly	<input checked="" type="checkbox"/> Mopping (indust.)	<input checked="" type="checkbox"/> Clerical
<input type="checkbox"/> Buffing	<input checked="" type="checkbox"/> Vacuuming	<input type="checkbox"/> Food line supply	<input checked="" type="checkbox"/> Pot scrubbing
<input checked="" type="checkbox"/> Dusting	<input checked="" type="checkbox"/> Restroom cleaning	<input checked="" type="checkbox"/> Trash disposal	<input type="checkbox"/> Other: (specify)
<input checked="" type="checkbox"/> Stocking	<input type="checkbox"/> Washing equipment	<input type="checkbox"/> Food serving	_____
			_____

**Medications?** None. \_\_\_\_\_

**Medical Complications/Conditions?** Eye therapy. \_\_\_\_\_

**Additional Comments:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Customer Profile Form

Customer Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Staff Completing Form: \_\_\_\_\_ I.D. Code: \_\_\_\_\_

Date of Screening (month/day/year): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Types of Screening: Initial \_\_\_\_ Ongoing/Employment \_\_\_\_ Ongoing/Unemployment \_\_\_\_

Total number of hours per week presently working: \_\_\_\_\_ Months per year: \_\_\_\_\_

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**General Directions: PLEASE DO NOT LEAVE ANY ITEM UNANSWERED**

Indicate the most appropriate response for each item based on observations of the customer and interviews with individual who know the customer (i.e., family members, adult service providers, school personnel, employers).

**1. Availability: (check Yes or No for each item)**

Will work weekends: \_\_\_\_ Yes \_\_\_\_ No

Will work evenings: \_\_\_\_ Yes \_\_\_\_ No

Will work part-time: \_\_\_\_ Yes \_\_\_\_ No

Will work full-time: \_\_\_\_ Yes \_\_\_\_ No

Specifics/Comments: \_\_\_\_\_

**2. Transportation: (check Yes or No for each item)**

Transportation available: \_\_\_\_ Yes \_\_\_\_ No

Access to specialized travel services: \_\_\_\_ Yes \_\_\_\_ No

Lives on bus route: \_\_\_\_ Yes \_\_\_\_ No

Family will transport: \_\_\_\_ Yes \_\_\_\_ No

Provides own transportation (bike, car, walks): \_\_\_\_ Yes \_\_\_\_ No

Specifics/Comments: \_\_\_\_\_

**3. Strength — Lifting and Carrying:**

\_\_\_\_ Poor (< 10 lbs)      \_\_\_\_ Fair (10-20 lbs)      \_\_\_\_ Average (30-40 lbs)      \_\_\_\_ Strong (> 50 lbs)

Specifics/Comments: \_\_\_\_\_

**4. Endurance: (without breaks)**

\_\_\_\_ Works < 2 hours      \_\_\_\_ Works 2-3 hours      \_\_\_\_ Works 3-4 hours      \_\_\_\_ Works > 4 hours

Specifics/Comments: \_\_\_\_\_

**5. Orienting:**

\_\_\_ Small area only \_\_\_ One room \_\_\_ Several rooms \_\_\_ Building wide \_\_\_ Building & ground

Specifics/Comments: \_\_\_\_\_

**6. Physical mobility:**

\_\_\_ Sit/stand in one area \_\_\_ Fair ambulation \_\_\_ Stairs/minor obstacles \_\_\_ Full physical abilities

Specifics/Comments: \_\_\_\_\_

**7. Independent work rate: (no prompts)**

\_\_\_ Slow pace \_\_\_ Steady/average pace \_\_\_ Above average/sometimes fast pace \_\_\_ Continual fast pace

Specifics/Comments: \_\_\_\_\_

**8. Appearance:**

\_\_\_ Unkempt/poor hygiene  
\_\_\_ Unkempt/clean

\_\_\_ Neat/clean but clothing unmatched  
\_\_\_ Neat/clean and clothing matched

Specifics/Comments: \_\_\_\_\_

**9. Communication:**

\_\_\_ Uses sounds/gestures  
\_\_\_ Unkempt/clean

\_\_\_ Speaks unclearly  
\_\_\_ Communicates clearly, intelligible to strangers

Specifics/Comments: \_\_\_\_\_

**10. Appropriate social interactions:**

\_\_\_ Rarely interacts appropriately  
\_\_\_ Polite, responses appropriate

\_\_\_ Initiates social interactions infrequently  
\_\_\_ Initiates social interactions frequently

Specifics/Comments: \_\_\_\_\_

**11. Unusual behavior:**

\_\_\_ Many unusual behaviors \_\_\_ Few unusual behaviors \_\_\_ No unusual behaviors

Specifics/Comments: \_\_\_\_\_

**12. Attention to task/perseverance:**

Frequent prompts required  
 Intermittent prompts/high supervision required

Intermittent prompts/low supervision required  
 Infrequent prompts/low supervision required

Specifics/Comments: \_\_\_\_\_

**13. Independent sequencing of job duties:**

Cannot perform tasks in sequence  
 Performs 2-3 tasks in sequence

Performs 4-6 tasks in sequence  
 Performs 7 or more tasks in sequence

Specifics/Comments: \_\_\_\_\_

**14. Initiative/motivation:**

Always seeks work     Sometimes volunteers     Waits for directions     Avoids next task

Specifics/Comments: \_\_\_\_\_

**15. Adapting to change:**

Adapts to change  
 Adapts to change with some difficulty

Adapts to change with great difficulty  
 Rigid routine required

Specifics/Comments: \_\_\_\_\_

**16. Reinforced needs:**

Frequent required  
 Intermittent (daily) sufficient

Infrequent (weekly sufficient)  
 Pay check sufficient

Specifics/Comments: \_\_\_\_\_

**17. Family Support**

Very supportive of work  
 Supportive of work with reservations

Indifferent about work  
 Negative about work

Specifics/Comments: \_\_\_\_\_

**18. Customer's financial situation:**

Financial ramifications no obstacle  
 Requires job with benefits

Reduction of financial aid is a concern  
 Unwilling to give up financial aid

Specifics/Comments: \_\_\_\_\_

**19. Discrimination skills:**

- Cannot distinguish between work supplies       Distinguishes between work supplies  
 Distinguishes between work supplies with an external cue

Specifics/Comments: \_\_\_\_\_

**20. Time awareness:**

- Unaware of time and clock function       Can tell time to the hour  
 Identifies breaks and lunch       Can tell time in hours and minutes

Specifics/Comments: \_\_\_\_\_

**21. Functional reading:**

- None       Sight words/symbols       Simple reading       Fluent reading

Specifics/Comments: \_\_\_\_\_

**22. Functional math:**

- None       Simple counting       Simple addition/subtraction       Computation skills

Specifics/Comments: \_\_\_\_\_

**23. Independent street crossing:**

- None       Crosses 4 lane street with light  
 Crosses 2 lane street with light       Crosses 4 lane street without light  
 Crosses 2 lane street without light

Specifics/Comments: \_\_\_\_\_

**24. Handling criticism/stress:**

- Resistive/argumentative       Accepts criticism/does not change behavior  
 Withdraws into silence       Accepts criticism/changes behavior

Specifics/Comments: \_\_\_\_\_

**25. Acts/speaks aggressively:**

- Hourly       Daily       Weekly       Monthly       Never

Specifics/Comments: \_\_\_\_\_

**26. Travel skills:** (check Yes or No for each item)

Requires bus training	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Uses bus independently/no transfer	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Uses bus independently/makes transfer	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Able to make own travel arrangements	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Specifics/Comments: \_\_\_\_\_

**27. Benefits consume needs:** (check Yes or No for each choice)

0 = None	<input type="checkbox"/> Yes	<input type="checkbox"/> No
1 = Sick Leave	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2 = Medical/health benefits	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3 = Paid vacation/annual leave	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4 = Dental benefits	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5 = Employee discounts	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 = Free or reduced meals	<input type="checkbox"/> Yes	<input type="checkbox"/> No
7 = Other (specify): _____		

**28. Check all that customer has performed:**

<input type="checkbox"/> Bus tables	<input type="checkbox"/> Sweeping	<input type="checkbox"/> Dish machine use	<input type="checkbox"/> Keeping busy
<input type="checkbox"/> Food prep.	<input type="checkbox"/> Assembly	<input type="checkbox"/> Mopping (indust.)	<input type="checkbox"/> Clerical
<input type="checkbox"/> Buffing	<input type="checkbox"/> Vacuuming	<input type="checkbox"/> Food line supply	<input type="checkbox"/> Pot scrubbing
<input type="checkbox"/> Dusting	<input type="checkbox"/> Restroom cleaning	<input type="checkbox"/> Trash disposal	<input type="checkbox"/> Other: (specify)
<input type="checkbox"/> Stocking	<input type="checkbox"/> Washing equipment	<input type="checkbox"/> Food serving	_____
			_____

**Medications?**

\_\_\_\_\_

**Medical Complications/Conditions?**

\_\_\_\_\_

**Additional Comments:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Situational Assessment

Customer: \_\_\_\_\_ Person Completing Form: \_\_\_\_\_ Date: \_\_\_\_\_

**Directions:** Indicate the response for each item in the appropriate category based on information gathered from the customer's parent, teacher, and observations during the situational assessments. For each item describe the behavior, characteristics, or activity. When applicable, include the frequency of its occurrence and the environment where it occurs (antecedent, consequences, location, people).

ITEMS LOCATED ON THE CUSTOMER EMPLOYMENT SCREENING FORM	SITUATIONAL ASSESSMENT I	SITUATIONAL ASSESSMENT II	SITUATIONAL ASSESSMENT III	OTHER	PARENT OR GUARDIAN
<b>Strength: Lifting and Carrying</b> <ul style="list-style-type: none"> <li>■ Poor (&lt;10 lbs.)</li> <li>■ Fair (10-20 lbs.)</li> <li>■ Average (30-40 lbs.)</li> <li>■ Strong (&gt;50 lbs.)</li> </ul>					
<b>Endurance</b> <ul style="list-style-type: none"> <li>■ Works &lt; 2 hours</li> <li>■ Works 2-3 hours</li> <li>■ Works 3-4 hours</li> <li>■ Works &lt; 4 hours</li> </ul>					
<b>Orienting</b> <ul style="list-style-type: none"> <li>■ Small area only</li> <li>■ One room</li> <li>■ Several rooms</li> <li>■ Building-wide</li> <li>■ Building and grounds</li> </ul>					
<b>Physical Mobility</b> <ul style="list-style-type: none"> <li>■ Sit/stand in one area</li> <li>■ Fair ambulation</li> <li>■ Stairs/minor obstacles</li> <li>■ Physical abilities</li> </ul>					

ITEMS LOCATED ON THE CUSTOMER EMPLOYMENT SCREENING FORM	SITUATIONAL ASSESSMENT I	SITUATIONAL ASSESSMENT II	SITUATIONAL ASSESSMENT III	OTHER	PARENT OR GUARDIAN
<p><b><i>Independent Work Rate (no prompts)</i></b></p> <ul style="list-style-type: none"> <li>■ Slow pace</li> <li>■ Steady/average pace</li> <li>■ Above average</li> <li>■ Sometimes fast</li> <li>■ Continual fast pace</li> </ul>					
<p><b><i>Appearance</i></b></p> <ul style="list-style-type: none"> <li>■ Unkempt/poor hygiene</li> <li>■ Unkempt/clean</li> <li>■ Neat/clean but clothing un-matched</li> <li>■ Neat/clean and clothing matched</li> </ul>					
<p><b><i>Communication</i></b></p> <ul style="list-style-type: none"> <li>■ Uses sounds/gestures</li> <li>■ Uses key words/signs</li> <li>■ Speaks unclearly</li> <li>■ Communicates clearly, intelligible to strangers</li> </ul>					
<p><b><i>Social Interactions</i></b></p> <ul style="list-style-type: none"> <li>■ Rarely interacts</li> <li>■ Appropriately</li> <li>■ Polite, responses appropriate</li> <li>■ Initiates social interactions infrequently</li> <li>■ Initiates social interactions</li> </ul>					
<p><b><i>Attention to Task/Perseverance</i></b></p> <ul style="list-style-type: none"> <li>■ Frequent prompts required</li> <li>■ Intermittent prompts/high supervision</li> <li>■ Intermittent prompts/low supervision</li> <li>■ Infrequent prompts/low supervision</li> </ul>					



ITEMS LOCATED ON THE CUSTOMER EMPLOYMENT SCREENING FORM	SITUATIONAL ASSESSMENT I	SITUATIONAL ASSESSMENT II	SITUATIONAL ASSESSMENT III	OTHER	PARENT OR GUARDIAN
<p><b><i>Independent sequencing of job duties</i></b></p> <ul style="list-style-type: none"> <li>■ Cannot perform tasks in sequence</li> <li>■ Performs 2-3 tasks in sequence</li> <li>■ Performs 4-6 tasks in sequence</li> <li>■ Performs 7 or more tasks in sequence</li> </ul>					
<p><b><i>Initiative/Motivation</i></b></p> <ul style="list-style-type: none"> <li>■ Always seeks work</li> <li>■ Sometimes volunteers</li> <li>■ Waits for directions</li> <li>■ Avoids next task</li> </ul>					
<p><b><i>Adapting to Change</i></b></p> <ul style="list-style-type: none"> <li>■ Adapts to change</li> <li>■ Adapts to change with some difficulty</li> <li>■ Adapts to change with great difficulty</li> <li>■ Rigid routine</li> </ul>					
<p><b><i>Reinforcement Needs</i></b></p> <ul style="list-style-type: none"> <li>■ Frequent required</li> <li>■ Daily</li> <li>■ Weekly</li> <li>■ Paycheck sufficient</li> </ul>					
<p><b><i>Level of Support</i></b></p> <ul style="list-style-type: none"> <li>■ Very supportive of work</li> <li>■ Supportive of work with reservation</li> <li>■ Indifferent about work</li> <li>■ Negative about work</li> </ul>					

ITEMS LOCATED ON THE CUSTOMER EMPLOYMENT SCREENING FORM	SITUATIONAL ASSESSMENT I	SITUATIONAL ASSESSMENT II	SITUATIONAL ASSESSMENT III	OTHER	PARENT OR GUARDIAN
<p><b><i>Discrimination Skills</i></b></p> <ul style="list-style-type: none"> <li>■ Cannot distinguish between work supplies</li> <li>■ Distinguishes between work supplies with an external cue</li> <li>■ Distinguishes between work supplies</li> </ul>					
<p><b><i>Time Awareness</i></b></p> <ul style="list-style-type: none"> <li>■ Unaware of time and clock function</li> <li>■ Identifies breaks/lunch</li> <li>■ Can tell time to the hour</li> <li>■ Can tell time in hours/minutes</li> </ul>					
<p><b><i>Functional Reading</i></b></p> <ul style="list-style-type: none"> <li>■ None</li> <li>■ Sight words/symbols</li> <li>■ Simple reading</li> <li>■ Fluent reading</li> </ul>					
<p><b><i>Functional Math</i></b></p> <ul style="list-style-type: none"> <li>■ None</li> <li>■ Simple counting</li> <li>■ Simple addition/subtraction</li> <li>■ Computational skills</li> </ul>					
<p><b><i>Independent Street Crossing</i></b></p> <ul style="list-style-type: none"> <li>■ None</li> <li>■ 2-lane street (with or w/o light)</li> <li>■ 4-lane street (with or w/o light)</li> </ul>					
<p><b><i>Handling Criticism/Stress</i></b></p> <ul style="list-style-type: none"> <li>■ Resistive/argumentative</li> <li>■ Withdraws into silence</li> <li>■ Accepts criticism/does not change</li> </ul>					

ITEMS LOCATED ON THE CUSTOMER EMPLOYMENT SCREENING FORM	SITUATIONAL ASSESSMENT I	SITUATIONAL ASSESSMENT II	SITUATIONAL ASSESSMENT III	OTHER	PARENT OR GUARDIAN
<b><i>Acts/Speaks Aggressively</i></b> <ul style="list-style-type: none"> <li>■ Hourly</li> <li>■ Daily</li> <li>■ Weekly</li> <li>■ Monthly</li> <li>■ Never</li> </ul>					
<b><i>Travel Skills</i></b> <ul style="list-style-type: none"> <li>■ Requires bus training</li> <li>■ Uses bus independently (with or w/o transfers)</li> <li>■ Able to make own travel arrangements</li> </ul>					
<b><i>Work Experience</i></b> <ul style="list-style-type: none"> <li>■ Employment site</li> <li>■ Job tasks performed</li> <li>■ Dates, hours, wages</li> </ul>					
<b><i>Physical Limitations</i></b> <ul style="list-style-type: none"> <li>■ Impairment</li> <li>■ Medications</li> <li>■ Medical restrictions</li> </ul>					
<b><i>Responding to Survival Words</i></b> <ul style="list-style-type: none"> <li>■ Street signs</li> <li>■ Restrooms</li> <li>■ Danger, stop</li> </ul>					
<b><i>Hurtful to Self/Others</i></b> <ul style="list-style-type: none"> <li>■ Banging head, pulling hair</li> <li>■ Biting, scratching</li> <li>■ Hitting, pinching</li> </ul>					
<b><i>Destructive to Property</i></b> <ul style="list-style-type: none"> <li>■ breaks, burns, tears things</li> </ul>					

ITEMS LOCATED ON THE CUSTOMER EMPLOYMENT SCREENING FORM	SITUATIONAL ASSESSMENT I	SITUATIONAL ASSESSMENT II	SITUATIONAL ASSESSMENT III	OTHER	PARENT OR GUARDIAN
<p><i>Disruptive Behavior that Interferes with Activities of Others</i></p> <ul style="list-style-type: none"> <li>■ Yelling, screaming</li> <li>■ Clinging</li> <li>■ Laughing/crying for no reason</li> <li>■ Interrupting</li> </ul>					
<p><i>Usual or Repetitive Behavior/habits</i></p> <ul style="list-style-type: none"> <li>■ Pacing</li> <li>■ Rocking</li> <li>■ Twirling fingers</li> <li>■ Twitching</li> </ul>					
<p><i>Behavior that is Socially Offensive to Others</i></p> <ul style="list-style-type: none"> <li>■ Talking too loud</li> <li>■ Burping, picking nose</li> <li>■ touching, hugging</li> </ul>					
<p><i>Withdrawal or Inattentive Behavior</i></p> <ul style="list-style-type: none"> <li>■ Keeping away from people</li> <li>■ Expresses unusual fears</li> <li>■ Shows little interest in activities</li> </ul>					
<p><i>Uncooperative or Noncompliant Behavior</i></p> <ul style="list-style-type: none"> <li>■ Refusing to attend school/work</li> <li>■ Refusing to follow rules/requests</li> <li>■ Acting defiant/pouting</li> </ul>					
<p><i>Leisure Skills/Interests</i></p>					
<p><i>Chores or Responsibilities</i></p>					

ITEMS LOCATED ON THE CUSTOMER EMPLOYMENT SCREENING FORM	SITUATIONAL ASSESSMENT I	SITUATIONAL ASSESSMENT II	SITUATIONAL ASSESSMENT III	OTHER	PARENT OR GUARDIAN
<i>Activities, Foods, and Items that are Reinforcing</i>					
<i>Money Skills</i> <ul style="list-style-type: none"> <li>■ Discriminates between coins</li> <li>■ Makes minor purchases</li> <li>■ Makes major purchases</li> <li>■ Amount of spending</li> <li>■ Money given to customer</li> <li>■ Willingness of family to give customer money from paycheck</li> </ul>					
<i>Asking for Assistance</i> <ul style="list-style-type: none"> <li>■ Peers</li> <li>■ Co-workers</li> <li>■ Acquaintances</li> <li>■ Persons in authority</li> </ul>					
<i>Other:</i>					

From: Moon, M.S., Inge, K.J., Wehman, P., Brooke, V., & Barcus, M. (1990). Helping persons with severe disabilities get and keep employment: Supported employment issues and outcomes. Baltimore: Paul H. Brookes.

# Individual Supports Assessment Form

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Date: \_\_\_\_\_ Provider ID: \_\_\_\_\_

Customer Name: \_\_\_\_\_ SS#: \_\_\_\_\_

Employment Specialist: \_\_\_\_\_ ID Code: \_\_\_\_\_

Street: \_\_\_\_\_ Initial: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ On-Going: \_\_\_\_\_

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Please answer each question regarding the customer's current goals, preferences, and experiences. Information needed to respond to each question should be obtained from the customer during a face-to-face interview prior to employment or while working if a change in employment is desired.

## *I. Vocational Goals and Experience*

1. **What are your career and life goals?** (Describe the job or position you would like to have and any other goals you would like to pursue, e.g., school, independent living, etc.)

2. **Where might you like to work?** (check all that apply)

- \_\_\_\_\_ 1) restaurant
- \_\_\_\_\_ 2) grocery store
- \_\_\_\_\_ 3) retail store
- \_\_\_\_\_ 4) hospital/nursing home
- \_\_\_\_\_ 5) office building
- \_\_\_\_\_ 6) hotel/motel
- \_\_\_\_\_ 7) university/school
- \_\_\_\_\_ 8) day care facility
- \_\_\_\_\_ 9) factory
- \_\_\_\_\_ 10) service provider/agency (e.g., church, park)
- \_\_\_\_\_ 11) don't know
- \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

**3. a. What type of job might you like to have? (check all that apply)**

- 1) dishwasher/kitchen utility worker
- 2) food prep person
- 3) food server
- 4) bus person/lobby attendant
- 5) janitor/housekeeper
- 6) laborer
- 7) assembler
- 8) laundry worker
- 9) stock clerk/bagger/warehouse worker
- 10) machine operator
- 11) clerical/office worker
- 12) groundskeeper/landscaper
- 13) human service worker
- 14) don't know
- 99) other (Describe: \_\_\_\_\_)

**b. Is there anyone you know who works in the places or in a position that you might like to have that you wouldn't mind us contacting?**

Name	Relationship	Phone #	Employment

**4. What types of things might be important to you in working in the position of your choice? (check all that apply)**

- 1) hours
- 2) benefits (e.g., paid vacations, sick leave, employee discount)
- 3) health insurance
- 4) wages
- 5) location of business
- 6) co-workers
- 7) work environment
- 8) nothing/don't know
- 99) other (Describe: \_\_\_\_\_)

**5. Have you ever been employed in a paid job before?**

- 1) yes
- 2) no

If yes, a) where did you work? 1) \_\_\_\_\_  
2) \_\_\_\_\_  
3) \_\_\_\_\_

b) what was your job title? 1) \_\_\_\_\_  
2) \_\_\_\_\_  
3) \_\_\_\_\_

6. Have you participated in any other work experiences (e.g., volunteer work, vocational training, etc.)?

\_\_\_\_\_ 1) yes \_\_\_\_\_ 2) no

If yes, describe the work that you did. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Who might you like to assist you in finding a job? (check all that apply)

\_\_\_\_\_ 1) parents  
\_\_\_\_\_ 2) brother/sister  
\_\_\_\_\_ 3) relatives  
\_\_\_\_\_ 4) girlfriend/boyfriend/spouse  
\_\_\_\_\_ 5) friends  
\_\_\_\_\_ 6) community member (Describe: \_\_\_\_\_)  
\_\_\_\_\_ 7) professional (Describe: \_\_\_\_\_)  
\_\_\_\_\_ 8) no one/don't know  
\_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

8. In what ways would you be willing to help with finding a job? (check all that apply)

\_\_\_\_\_ 1) identifying job leads  
\_\_\_\_\_ 2) looking at the newspaper  
\_\_\_\_\_ 3) contacting employers  
\_\_\_\_\_ 4) picking up job applications  
\_\_\_\_\_ 5) developing a resume  
\_\_\_\_\_ 6) none/don't know  
\_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

9. What means of transportation would you be willing to use in order to go to and from work? (check all that apply)

\_\_\_\_\_ 1) drive self  
\_\_\_\_\_ 2) friend or family member transport  
\_\_\_\_\_ 3) walk  
\_\_\_\_\_ 4) ride a bicycle  
\_\_\_\_\_ 5) ride the bus  
\_\_\_\_\_ 6) use a taxi



- \_\_\_\_\_ 7) carpool
- \_\_\_\_\_ 8) ride with co-workers
- \_\_\_\_\_ 9) use specialized transportation
- \_\_\_\_\_ 10) none/don't know
- \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

## *II. Interests*

### 10. What do you do during your free time?

- \_\_\_\_\_ 1) watch television
- \_\_\_\_\_ 2) shop/go to the mall
- \_\_\_\_\_ 3) participate in organized recreational or sporting activities
- \_\_\_\_\_ 4) go to sporting events
- \_\_\_\_\_ 5) go bowling
- \_\_\_\_\_ 6) roller skate/ice skate
- \_\_\_\_\_ 7) read books or magazines
- \_\_\_\_\_ 8) go to movies
- \_\_\_\_\_ 9) listen to music
- \_\_\_\_\_ 10) go to concerts
- \_\_\_\_\_ 11) hang out with friends
- \_\_\_\_\_ 12) go dancing
- \_\_\_\_\_ 13) talk on the telephone
- \_\_\_\_\_ 14) hobbies
- \_\_\_\_\_ 15) arts and crafts
- \_\_\_\_\_ 16) nothing
- \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

### 11. Are there other things you would like to do during your free time?

- \_\_\_\_\_ 1) yes
- \_\_\_\_\_ 2) no

**If yes, what kinds of things would you like to do? (check all that apply)**

- \_\_\_\_\_ 1) watch television
- \_\_\_\_\_ 2) shop/go to the mall
- \_\_\_\_\_ 3) participate in organized recreational or sporting activities
- \_\_\_\_\_ 4) go to sporting events
- \_\_\_\_\_ 5) go bowling
- \_\_\_\_\_ 6) roller skate/ice skate
- \_\_\_\_\_ 7) read books or magazines
- \_\_\_\_\_ 8) go to movies
- \_\_\_\_\_ 9) listen to music
- \_\_\_\_\_ 10) go to concerts
- \_\_\_\_\_ 11) hang out with friends

- \_\_\_\_\_ 12) go dancing
- \_\_\_\_\_ 13) talk on the telephone
- \_\_\_\_\_ 14) hobbies
- \_\_\_\_\_ 15) arts and crafts
- \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

**12. Who do you usually spend your free time with? (check all that apply)**

- \_\_\_\_\_ 1) friends
- \_\_\_\_\_ 2) girlfriend/boyfriend/spouse
- \_\_\_\_\_ 3) parents
- \_\_\_\_\_ 4) brothers/sisters
- \_\_\_\_\_ 5) relatives
- \_\_\_\_\_ 6) neighbors
- \_\_\_\_\_ 7) peers (e.g., students, workshop participants)
- \_\_\_\_\_ 8) general public
- \_\_\_\_\_ 9) no one
- \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

**13. Do you participate in any clubs or organizations? (check all that apply)**

- \_\_\_\_\_ 1) 4-H clubs
- \_\_\_\_\_ 2) church/synagogue
- \_\_\_\_\_ 3) health/fitness club
- \_\_\_\_\_ 4) hobby clubs (e.g., card or stamp collecting, bingo, etc.)
- \_\_\_\_\_ 5) community recreational programs
- \_\_\_\_\_ 6) sports teams
- \_\_\_\_\_ 7) school clubs/groups
- \_\_\_\_\_ 8) YMCA/YWCA
- \_\_\_\_\_ 9) civic organizations (Describe: \_\_\_\_\_)
- \_\_\_\_\_ 10) special interest groups (Describe: \_\_\_\_\_)
- \_\_\_\_\_ 11) none/don't know
- \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_)

**14. Are there any clubs or organizations you would like to belong to or participate in?**

- \_\_\_\_\_ 1) yes
- \_\_\_\_\_ 2) no

**If yes, what clubs or organizations would you like to become involved with?**

- \_\_\_\_\_ 1) 4-H clubs
- \_\_\_\_\_ 2) church/synagogue
- \_\_\_\_\_ 3) health/fitness club
- \_\_\_\_\_ 4) hobby clubs (e.g., card or stamp collecting, bingo, etc.)
- \_\_\_\_\_ 5) community recreational programs
- \_\_\_\_\_ 6) sports teams
- \_\_\_\_\_ 7) school clubs/groups
- \_\_\_\_\_ 8) YMCA/YWCA
- \_\_\_\_\_ 9) civic organizations (Describe: \_\_\_\_\_)

- \_\_\_\_\_ 10) special interest groups (Describe: \_\_\_\_\_ )  
 \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_ )

**15. a. Does a family member or friend belong to or participate in any of the following clubs or organizations? (check all that apply)**

- \_\_\_\_\_ 1) American Association of Retired Citizens  
 \_\_\_\_\_ 2) American Red Cross  
 \_\_\_\_\_ 3) Big Brothers/Big Sisters  
 \_\_\_\_\_ 4) Chamber of Commerce  
 \_\_\_\_\_ 5) church/synagogue  
 \_\_\_\_\_ 6) Civitans  
 \_\_\_\_\_ 7) community or neighborhood association  
 \_\_\_\_\_ 8) Cooperative Extension Service  
 \_\_\_\_\_ 9) Elks Club  
 \_\_\_\_\_ 10) hobby clubs  
 \_\_\_\_\_ 11) Jaycees  
 \_\_\_\_\_ 12) Junior League  
 \_\_\_\_\_ 13) Junior Women's Club  
 \_\_\_\_\_ 14) Kiwanas  
 \_\_\_\_\_ 15) Knights of Columbus  
 \_\_\_\_\_ 16) Lions  
 \_\_\_\_\_ 17) Masonic Temple  
 \_\_\_\_\_ 18) Mocha Temple  
 \_\_\_\_\_ 19) Moose Club  
 \_\_\_\_\_ 20) recreation and park department  
 \_\_\_\_\_ 21) Shriners  
 \_\_\_\_\_ 22) sport team (Describe: \_\_\_\_\_ )  
 \_\_\_\_\_ 23) special interest group (Describe: \_\_\_\_\_ )  
 \_\_\_\_\_ 24) union (e.g., Teamsters, AFL-CIO)  
 \_\_\_\_\_ 25) United Way (continued)  
 \_\_\_\_\_ 26) volunteer work (Describe: \_\_\_\_\_ )  
 \_\_\_\_\_ 27) YMCA/YWCA  
 \_\_\_\_\_ 28) none/don't know  
 \_\_\_\_\_ 99) other (Describe: \_\_\_\_\_ )

**b. Are there any individuals who belong to the above clubs or organizations that you wouldn't mind us contacting?**

Name	Relationship	Phone #	Organization

***III. Potential Support Options/Support Needs***

**16. Who do you live with? (check all that apply)**

- 1) no one
- 2) parents
- 3) girlfriend/boyfriend/spouse
- 4) brothers/sisters
- 5) relatives
- 6) friends
- 7) roommates
- 8) personal assistant
- 9) professionals/paid staff
- 10) residents
- 99) other (Describe: \_\_\_\_\_)

**17. Who usually assists you when you need something or have a problem? (check all that apply)**

- 1) parent/guardian
- 2) brothers/sisters
- 3) girlfriend/boyfriend/spouse
- 4) relatives
- 5) friends
- 6) community members
- 7) neighbors
- 8) teacher
- 9) rehabilitation counselor
- 10) case manager
- 11) no one
- 99) other (Describe: \_\_\_\_\_)

**18. When you want to go somewhere, how do you usually get there? (check all that apply)**

- 1) drive
- 2) friend or family member transports
- 3) walk
- 4) ride a bicycle
- 5) ride the bus
- 6) use a taxi
- 7) use specialized transportation
- 99) other (Describe: \_\_\_\_\_)

**19. a) Do you receive Social Security benefits (e.g., SSI, SSDI)?**     1) yes     2) no

**b) If yes, is the potential loss of Social Security benefits due to future employment a concern?**     1) yes     2) no

20. a) Are there any types of services or supports that you would like or are in need of and are not receiving? \_\_\_\_\_ 1) yes \_\_\_\_\_ 2) no
- b) If yes, identify the type of assistance you would like.