Documenting Discovery:
Developing a Descriptive a Profile to Guide Employment Plans
Pathways to Employment Resource Center (PERC) Curriculum

The result of any professional process that provides services to individuals with disabilities should include written documentation that provides both the funder and the individual with a report of the findings. Traditionally, this documentation has been in the form of an assessment report. A typical assessment report is comprised of a multi-page document that provides a brief description of the tools used for assessment as well as a more in-depth account of the individual's performance, often augmented by numerical data such as scores, times, rankings and other quantitative results that compares the person to the normative performance of others. Unfortunately, even the most professionally written assessment report contains bad news for individuals with significant disabilities. When the assessment is performance based and the impact of the individual's disability is in the area of performance, it is hardly a surprise that the assessment report will be inevitably negative. This reality has existed throughout the history of comparative assessments.

This negative outcome creates a contradiction in the age of "employment first" initiatives and "employment for all" values. How can employment professionals use negative information to guide employment possibilities? The fact is, it simply doesn't work. What is needed is a positive, optimistic document that can guide possibilities rather than, as with traditional assessment reports, serve as a rationale for exclusion from employment services. The profile document developed my Marc Gold & Associates provides such an alternative. The profile, consisting of three discrete sections, is available online at no charge at marcgold.com.

Is there an alternative to traditional assessment reports?

Yes, rather than using a traditionally accepted format that relies heavily on numerical indicators of how the individual compares to expected norms, as well as the opinion of the evaluator, it is possible to develop a document that describes the individual in reference to the array of typical life activities and performance. From this description it is then possible to perform the fundamental finesse of discovery – translation of life skills to work possibilities. Regardless of the specific format one might choose to describe the individual, this type of document should contain the following characteristics:

- Narrative: A discovery document should use full sentences, avoiding checklists, rankings and scores, to describe the various aspects of the person's life.
- Opinion-free: A discovery document should focus on the individual rather than the opinions of the facilitator.
- Optimistic: A discovery document should proceed from the expectation that the person can and should work and must never deem a person "not feasible" or unemployable".
- Respectful: A discovery document should be the employment equivalent of an "authorized biography", belonging to the individual rather than to the agency or funding system.
- Comprehensive: A discovery document should be sufficiently broad in scope across the domains of a person's life to find examples of the person at his/her best.
- Robust: A discovery document should reflect depth in areas of importance to the individual.
- Non-evaluative: A discovery document should not reference comparisons to norms or to others, except in areas of excellence for the individual.
- A resource for planning: A discovery document should provide the information necessary for effective employment planning.

These eight characteristics should apply to any format used to organize the information of discovery. However, there remains one characteristic of overarching importance that if handled in an effective way, will go a long way to assure that the other eight features are included – *descriptiveness.* The most important characteristic of a quality discovery document is the facilitator's ability to focus on and write about what the individual does while minimizing the opinions, concerns and biases of those involved in discovery. Descriptive writing will be addressed in detail later.

The closest example to help explain the profile document is that it is the person's current life story organized in an outline form. Since the story belongs to the person, it is critical for facilitators to purposefully stay out of the narrative as much as possible. By doing this it is impossible to "fail" discovery. In discovery every person of concern starts with an "A" and ends the process with an "A". This is only possible when facilitators simply tell the person's story in a descriptive narrative. It is also of critical importance to focus on possibilities rather than on barriers and negatives. Metaphorically, discovery is a "glass half full" activity between facilitator and individual.

Is it really necessary to write a document following Discovery?

Obviously, many facilitators of discovery would prefer the answer to this question to be "not necessarily". After all, no matter how it might be characterized in terms of a positive description of the person's life, the resulting document of discovery is paperwork. But it is of vital importance to understand the critical importance of the written document in relation to discovery.

The most important reason to develop a profile is that the funding bureaucracy pays, essentially, for paper that indicates performance. Without written document there is no evidence of the meaning of Discovery. Additionally, if we are to be successful in promoting Discovery as an alternative to traditional comparative assessments, we must give funders an alternative document to replace the assessment report.

Another rationale for writing a formal document for Discovery is that writing is a cathartic activity that forces us to come to terms in a concrete manner with what we have learned about the person. The act of writing focuses our thoughts and reflections in way that verbal discussions do not.

The efficient sharing of information also comprises an important rationale for documenting Discovery in a formal, written manner. One of the limitations of an person-centered planning process occurs when one of two things occur: 1. The presumption that a collection of individuals who know the person all know the same thing and, 2. The imbalance of information about the individual possessed by only one or two of those who are assisting in the plan. These problems can be eliminated by sharing a carefully written document that describes the person. The Profile can assemble the pieces of the individual's life puzzle in a way that all can understand and see.

If a single characterization could sum up the issue of significant disability it would likely be *complexity*. If we do not take the time to document the complexity, the nuance, in the lives of people with significant disabilities, our efforts to pursue outcomes such as employment are vulnerable to that which is overlooked. A comprehensive Profile document provides the necessary detail to recognize both possibilities and pitfalls regarding the individual.

A final rationale for writing a document for Discovery is that it offers the sound bites that can be used by job developers when talking with potential employers, co-workers and

others in the effort to secure and support employment. Descriptive gems can be borrowed from the Profile to assist in making the case for contributions to employers. Consider the passage from a profile describing the skills of a young woman in her father's trucking firm, "About once a week Sadie walks through the parking area of her dad's trucking firm and she looks at the license tag dates and the inspection stickers on each truck. She then goes in to her father's office and tells him which trucks are either currently out of date or that are about to be. She does this from memory without notes or other information to assist her." Imagine the power of using that descriptive jewel when talking to a potential employer who has the need to have time/date sensitive materials recognized.

Why is descriptiveness so important?

When job seekers with significant disabilities are looked at from a comparative, evaluative perspective, the negative impact of their disability often overrides any areas of competence the person may have. Even the most optimistic evaluators must acknowledge discrepancies between the performance of the job seeker and that expected by the norms of the assessments utilized. It is a simple fact to say that the more significant one's disability is, the less likely it is that the person will compare well to norm based standards. This reality is so universal that many professional evaluators say that they "know" when a certain person will do poorly on an evaluation, even prior to the assessment. Discovery is a process that allows employment professionals to move forward, optimistically, by getting to know the individual and translating features of life to employment possibility by delving into the positive aspects of an individual's life rather than testing, comparing and predicting. Because Discovery seeks to uncover important aspects of the individual's life, it is useful to describe rather than to evaluate the information uncovered. Descriptiveness allows employment professionals to intentionally remove themselves from the person's story by concentrating on what happens rather then how they feel about what happens.

Beyond removing our evaluative opinions from the person's story, descriptiveness also opens the door to allow us to see competence. Consider the following characterizations of a young man baking brownies. The first perspective is a typical evaluative perspective of his teacher:

Damian can cook simple items with assistance. He cannot set the oven temperature independently and care should be taken to assure that he does not burn himself. He

cannot read the directions on the box. Damian required one-to-supervision to mix and prepare the brownies and to put them into the oven. He cannot be trusted to cut the brownies with a knife.

Next is a descriptive account of the exact same activity. Note the differences between the two perspectives.

*Damian selects the brownie mix from the pantry, finds a mixing bowl from the cabinet and removes a mixing spoon from the utensil drawer, after being reminded by a staff person. As the staff person reads the directions he opens the box, pours the mix into the bowl and continues to blend in ingredients. When he completes the mixing he pours the mixture in a glass pan following a gesture by the staff person. The staff person says, "What's next?" and Damian points to the oven thermostat. The staff person says, "Which button is for bake?" and Damian pushes the **Bake** button. Damian then begins to turn the thermostat and the staff person says, "Stop at 375." As Damian nears 375, the staff person says, "That's it." and he stops at a nearby indicator. The staff person says, "One more click." and Damian completes the setting. The staff person asks, "How long do we cook them?" and Damian says 30 minutes. Damian sets the timer similar to the oven. When the timer goes off, Damian puts an oven mitt on his right hand and opens the oven with his left. As he reaches in the staff person says, "Careful, everything is hot." Damian grasps the pan and slides it out of the oven, keeping the container level. When the brownies had cooled, Damian removes a serving knife from the utility drawer and cuts the brownies into small squares with hand-over-hand assistance from the staff person.*

When examining the first narrative account, it is difficult to find any specific skills that Damian used during the preparation of the brownies. However, by simply focusing on what actually occurred, rather than on a professional evaluative opinion of the performance, it is possible to find many discrete skills that could be translated into employment possibilities. It is important to take descriptive notes during Discovery so that we can condense important information into a descriptive Profile document.

Is there one format that is best to use?

There are numerous ways in which the important aspects of a person's life could be organized for a discovery document. We recommend that an outline format be used to assist both the facilitator and the individual to more easily address areas of importance.

The exact manner in which the headings and sub-headings of the outline are divided is less important, as long as the characteristics discussed above are in place. Overall, a profile document must accomplish at least three functions:

1. A profile document should provide sufficient overview information about the job seeker so that facilitators know about the person's living situation, including those with whom their home is shared; their home, neighborhood and community; their educational history and their employment experiences and history.
2. A profile document should provide a comprehensive, descriptive account of the important domains of the individual's life.
3. A profile document should provide a summarization of the information to be considered in a customized plan for employment.

The author of this section recommends the profile documents developed by Marc Gold & Associates as a format that meets all three of these components. Outlines, samples and guides are available at marcgold.com for a free download.

What is the employment purpose of the Profile document?

The profile provides several functions in the process of customizing employment for individuals with significant disabilities. Again, the example used for this narrative references the Profile as developed by Marc Gold & Associates. This format is free to download from marcgold.com. Regardless of the specific format you choose, it is critically important to understand the role the document, and any component sections, play in the employment process.

The Profile used by MG&A is comprised of three parts that meet the functions described above. Part I of the profile provides an overview of the information necessary to initiate discovery activities. This component gathers personal and family identification information, a description of the home, neighborhood and community, the job seeker's education and employment history. The information can be gleaned from existing documents on the individual or developed during a meeting that serves to kick-off the discovery process.

Part II of the Profile, comprises the descriptive heart of Discovery. In this section a conscious effort is made to describe the person's life without evaluating or comparing. In this way a foundation is laid from which the facilitator can translate skills of life to

employment possibilities in Part III of the document. As described earlier, there is a bias within Discovery and the writing of profile and that bias is toward optimism and competence. We recognize that many people with significant disabilities experience challenges and might have negative aspects of performance within their lives, however, Discovery and the Profile should focus on those aspects of life that are likely to result in success. This is similar to the way a typical job seeker might characterize themselves within a resume to a potential employer. Even though we all have challenging and perhaps even negative aspects of our lives, we only present the best to employers. Section II of the Profile follows this metaphor. The outline of this section identifies life domains that need to be understood for both planning and translation. MG&A profile document for Part II, the Discovery Profile, contains the following headings that reference these life domains:

1. Individual, family and friends
2. Educational experiences
3. Employment experiences and related activities
4. Life activities and experiences
5. Description of skills, interests and conditions in life activities (across 11 categories)
6. Connections

By describing the individual within these areas it is possible to have a sufficient basis for the ensuing customized plan for employment. It is evident that though this list of headings to be address is thorough, it is not intended to be exhaustive. Any descriptive documentation of Discovery needs to balance two considerations in order to be considered effective by funders of employment services – the documentation must be comprehensive enough to inform a plan for employment and it must be efficient, sufficient to meet the need and no more.

Part III of the Profile creates a link with the planning process that follows Discovery. The framework of Part III, the Plan Preparation Summary, essentially mirrors that of the Customized Plan for Employment utilized by Marc Gold & Associates. Regardless of the specific plan you use to guide job development efforts and establish employment goals, documentation of Discovery should reference and inform the planning process. The style of writing in Part III varies slightly from that used in Part II in that the second component of the Profile is written as descriptively as possible, without summarization or opinion from the facilitator. Part III of the Profile allows the facilitator to begin to make

sense of all the descriptive information contained in Part II by summarizing trends and leads, by translating aspects of life into possibilities and by carefully and optimistically expressing opinions of what works best for the person and what to avoid. Part III also allows the facilitator to account for the challenges faced by the individual but any potential barrier to employment must be characterized from a solution perspective rather than exclusionary one. Remember, one cannot "fail" Discovery.

MG&A recommends a framework for Part III of the Profile that mirrors the Customized Plan as closely as possible. The following sections are included in this section of the Profile document:

1. Conditions for Success
2. Interests (across life activities)
3. Contributions
4. Challenges
5. Potential Employers (that are consistent with #1-3, above)

The effective development of this framework should provide a robust amount of information in each area that will be distilled within the Plan in a way that creates a blueprint for developing a customized job that truly fits the individual.

What about writing a Profile for students?

There are differences to be considered when writing profiles for students in schools as opposed to adults. For adults, the Profile document needs to be as complete as possible so as to better inform the Customized Plan for Employment. In other words a Profile for adults is a document suitable for use as a payable to funders such as VR, state disability services or Medicaid. However, at many points during a student's educational experiences, a Profile is a work in progress initiated at the onset of transition and added to by each subsequent educator who has interactions with that student. It is a bit like moving a "paint by numbers" portrait of a person to a photograph in crystal-clear focus over the years of transition. This means that the Profile form does not need to be a finished product until it is necessary to use that document for employment planning. This allows teachers to add nuance and unique perspective without having to be responsible for developing a "payable quality" Profile until it is actually needed.

Is it possible to use formats other than narrative documents?

This is an interesting question. On one hand, it is certainly possible to document the information of Discovery in a format other than the comprehensive written narrative. Many such formats have been used since the onset of Person-Centered Planning strategies began to evolve in the early 1980's. Examples of alternative formats might include scrapbooks, visual/graphic representations, oral histories, outlines, vignettes and discovery meetings. Some feel that these strategies enhance the richness of the individual's life in a more comfortable, participatory manner than with a written document. The experience of MG&A has been that these options, used in an intentional and organized way, can comprise a very useful way to capture Discovery.

However, there is a significant downside to moving away from written documentation – providing a fit with our funders. Providing a useful documentation for funding is not easily done for any of these alternatives. And if one is successful in convincing a funder to accept any of these approaches, additional documentation such as detailed notes is often necessary. When using the written narrative, the document provides the documentation for funding. We encourage facilitators, who feel that alternatives to written documentation would enhance the process, to do both. Use the alternative but also do the due diligence associated with the written document.