

A Delphi Study to Improve Agreement Regarding Vocational Assessment Terminology

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Abstract

Vocational evaluation and career assessment services are vital for individuals with disabilities, providing them and their families with essential information to make well-informed decisions regarding their education, careers, and independent living.

However, significant variability exists among providers and settings in terms of the types, quality, and intensity of these services. Despite prior literature defining various levels of vocational assessment, inconsistency persists in how vocational evaluation and career assessment are applied in research and practice; inconsistency can also create uneven and poorly designed services, which negatively impact clients. This inconsistency hampers effective research and impedes accurate program evaluation. Through this study, researchers aimed to establish distinct definitions of vocational assessment and vocational evaluation to promote consistency in research, practice, policy, and advocacy. The study employed a modified electronic Delphi survey technique, consisting of two survey Rounds, with participation from 21 experts. Four key definitions emerged from the study including an overall definition for vocational assessment as well as definitions for each of the three levels of vocational assessment. These definitions provided experts an opportunity to describe and distinguish the range of vocational assessment services provided. Recommendations for future research and practice are provided.

Keywords: vocational evaluation, Delphi method, vocational assessment, levels of assessment, vocational rehabilitation

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Vocational assessment, sometimes used interchangeably with career assessment, plays a crucial role in facilitating favorable vocational outcomes and improved quality of life for individuals, particularly those with disabilities. Specifically, vocational assessment serves to (a) identify strengths and needs for matching individuals with suitable and productive career options (McDonnall, 2013); (b) empower individuals in making well-informed career decisions (Sampson et al., 2004); (c) prescribe tailored interventions to address skills gaps and support successful employment (Lent, 2020); (d) enhance employment retention rates and overall job satisfaction (Baldwin et al., 2018); and (e) ensure adherence to legal and policy requirements such as assessment requirements in transition services and government and related agencies (Rumrill et al., 2012).

The field of vocational evaluation emerged to address the need for assessing individuals' abilities and aptitudes to achieve compatible and successful employment, particularly for those with severe disabilities (Neff, 1970; Pruitt, 1986), in a different way. Vocational evaluation was devised as a necessary alternative to paper-pencil testing, serving as a performance-based, authentic assessment process for those whom traditional assessment (i.e., testing) was discriminatory and lacked predictive validity (McDaniel, 1988; Neff, 1966).

Although assessment had always been part of the vocational rehabilitation system, the introduction of legislation in the 1950s to extend vocational rehabilitation services to individuals with more severe disabilities highlighted the limitations of

traditional paper-and-pencil tests. In fact, the use of such instruments served as barriers to identifying the abilities, aptitudes, preferences, and skills of some clients (Nadolsky, 1981). Consequently, more diverse methods of assessment, such as behavioral observations (i.e., objective collection of information about a client's physical performance, social characteristics, and interactions with people and the environment; Power, 2013), work samples (i.e., an assessment approach whereby the client is observed performing a simulated or actual work task; Rubin et al., 2016), situational assessment (i.e., an observation process that is used to gather information about an individual's work-related behavior and work performance in a work environment), and job tryouts (a method of community-based assessment designed to provide the client with real work and community contacts via a temporary job placement or internship) were introduced. These improved practices evolved into the professional specialty of vocational evaluation (Hamilton & Schumate, 2005), distinguishing it from other helping and assessment professions. "The experiential" basis for vocational evaluation "and its practical realistic work-related techniques and procedures... 'set it apart' from traditional programs of vocational assessment and guidance." (Nadolsky, 1981, p. 6).

Vocational evaluation became a profession requiring special skills for understanding and performing work requirements in various occupations (Hamilton & Shumate, 2005). For example, to create work samples, one must conduct job, training, and task analyses within real occupational or training environments. Actual equipment, tools, and materials are used to replicate work in an assessment setting or

within the work setting (e.g., situational assessment, job tryouts). Vocational evaluators must understand and perform work samples and situational assessments because they must follow a cardinal vocational assessment rule of trying out and learning to perform all assessment techniques and instruments, including those that replicate real work, before administering them to clients. The vocational evaluators learn to correlate an individual's preferences, abilities, and behaviors with work demands to make specific educational or employment recommendations.

Vocational evaluators, however, are not the only professionals who provide vocational assessment. Vocational assessment is utilized in various contexts and by multiple professional disciplines, including vocational rehabilitation, special education, employment services, behavioral health, and allied health professions, such as occupational therapy. Furthermore, vocational assessment is used in various settings, including vocational rehabilitation agencies (i.e., public, private, not-for-profit; Hagner et al., 2012), educational institutions (Test et al., 2009), workforce development programs (Betz, 2008), correctional facilities (Lambert et al., 2001), and medical and rehabilitation facilities (Parker et al., 2004). The use and implementation of vocational assessment vary depending on the characteristics and type of individual being served, available resources, legislative mandates, and organizational goals and priorities. Due to the shortage of trained and experienced vocational evaluators, many of these professionals may not be specially trained in vocational evaluation or may not utilize work-related, performance-based assessment methods, meaning that what sets apart vocational evaluation from other types of vocational assessment may no longer be the

case (MacDaniel, 1988). Thus, we may not be providing non-discriminatory services to the individuals who require more work-based methods.

While there is an acceptable amount of variability and disagreement in terminology due to interdisciplinary areas or emerging service areas, the term vocational assessment may be too general. It can be interpreted differently across settings and professionals. Miscommunication and misunderstanding are created when the definition and description of vocational assessment are too broad. Professionals, clients/participants, educators, employers, and policymakers may have divergent understandings of what constitutes vocational assessment, leading to confusion and misunderstanding (Betz, 2008). Quality assurance is difficult because it can be challenging to hold providers of vocational assessment services accountable for the quality and effectiveness of services when inconsistent definitions and practices are being used (Parker et al., 2004). Legal and ethical concerns arise related to fairness, equity, and quality of services due to a lack of clarity on the specific services provided (Hagner et al., 2012; CRCC, 2024). Finally, inconsistent use of definitions and practices of vocational assessment may hinder the accumulation of empirical evidence necessary to develop evidence-based practices and interventions (Betz, 2008).

Unification regarding terminology and definitions can strengthen professions by promoting clarity to all stakeholders. Clarity is essential when evaluating the outcomes of services to ensure that their merits are being assessed accurately. Crow's (1975) Three Levels framework delineates the spectrum of services encompassed within vocational assessment. This framework categorizes vocational assessment into three

distinct levels, each varying in depth and scope. Level One serves as a preliminary screening or needs assessment, while Level Two delves deeper into clinical or exploratory assessment. Finally, Level Three constitutes a comprehensive vocational evaluation. This framework is valuable for encompassing the range of vocational assessments that can be provided by structuring delineations of each level's characteristics and considering that not all vocational assessments are equal. This delineation helps distinguish between the types of vocational assessment and sets expectations regarding what quality services look like. Also, the levels are helpful for cost-effectiveness. Rather than referral sources paying for the most comprehensive Level Three for all clients, the referral source may refer to quicker and less intensive Levels One or Two for many clients with fewer needs. Despite these benefits, the Three Levels framework is not widely used, especially outside of vocational rehabilitation services. For example, the National Career Development Association (NCDA) and the Commission on Rehabilitation Counselor Certification (CRCC) do not refer to Crow's Three Levels of vocational assessment in their ethical codes (CRCC, 2024; NCDA, 2024).

Justification for Current Study

There are several reasons why the Three Levels framework is not universally used. The field of vocational evaluation faces many challenges, including no current, dedicated graduate degree programs (since 2014), which hinder the development of a cohesive professional identity. The credentialing process is fragmented, with diverse viewpoints on the necessary requirements for obtaining credentials and a notable absence of a universally agreed-upon credentialing standard. Examples include the

Certified Vocational Evaluation Specialist (CVE) from the Commission on Rehabilitation Counselor Certification (CRCC), the International Certified Vocational Evaluator (ICVE) from the Canadian College of Vocational Rehabilitation Professionals (CVRP), and the International Psychometric Evaluation Certification (IPEC) from the American Board of Vocational Experts (ABVE). Collaborations with Canadian vocational evaluators have taught us that they do not currently use the Three Levels framework (personal communication, M. Smith, 2022). Legislative, policy, and other changes related to vocational rehabilitation and special education, such as technological advances, remote assessment, and the expanding gig economy, have affected the scope and delivery of vocational assessment. Considering the elapsed time since the publication of Crow's 1975 framework, the myriad challenges facing the field, and the need to increase agreement within vocational assessment terminology, a fresh examination of the framework within the contemporary context was justified. Furthermore, using an empirical approach in the investigation could contribute to improved professional consensus regarding the essential definitions and descriptions of foundational vocational assessment terminology and identify where differing opinions exist. Therefore, the current study aims to improve agreement among practicing experts in the field by drawing out more robust descriptions of (a) the definition of Level One vocational assessment, (b) the definition of Level Two vocational assessment, (c) the definition of Level Three vocational assessment; and (d) the definition of vocational assessment overall.

Method

Study Design

The Delphi Method is a structured, iterative approach used to gather and analyze expert opinions on a particular topic through a series of surveys, often conducted anonymously (Rowe & Wright, 2023). The aim of the Delphi method is to reach group consensus. The current study used a modified electronic Delphi survey technique. The Delphi method is deemed suitable for situations where there is a need for subjective opinions on a topic lacking consensus, experts are geographically dispersed, and anonymity facilitates more honest and candid feedback (Rowe & Wright, 2023). Traditional Delphi studies utilize iterative Rounds of surveys to gather opinions from experts on a particular matter until a desired consensus is achieved. Modified Delphi studies differ from traditional methods by permitting adjustments to the items under consideration based on input from panel members (Keeney et al., 2011). Researchers in this study incorporated a dual approach, featuring an initial Round characterized by traditional quantitative ratings and open-ended questioning, followed by a subsequent Round that adjusted items based on feedback from experts. An electronic Delphi approach was chosen due to the diverse geographical distribution of participants across the United States and Canada.

The Delphi method is considered a valuable research approach because it is a way to elicit expert opinions from individuals knowledgeable in a specialized area (Rowe & Wright, 2023). The Delphi method has been widely used in rehabilitation and related research. The modified electronic survey process used in this study was adapted from recommendations provided by Vázquez-Ramos et al. (2007) and Keeney et al. (2011). Prior to recruiting experts, a study protocol was approved by the Institutional Review

Board at Northern Illinois University, DeKalb, IL. The study was conducted over approximately nine months, from February to October 2023.

The research team consisted of four professionals and one student, all of whom have knowledge and experience in vocational evaluation and rehabilitation counseling. The lead author served as the overall project manager to ensure that each stage of the Delphi process was completed according to the research plan. The lead author also communicated with participants with assistance from the second and third authors and a contributor with connections in the field. The lead author is a tenured associate professor at a large midwestern university. The second and third authors, as content experts, contributed to the development of the survey and the analysis of the data. The second author is an assistant professor, and the third author is a retired professor. The fourth author assisted with data analysis, supported the lead author with project management, and was a student in a master's program in rehabilitation counseling.

Expert Panel Selection

One of the most important steps in the Delphi process was the selection of participants to serve as experts in the study (Hsu & Sandford, 2007). Most Delphi studies use purposeful recruitment to select participants (a) who have the expertise and knowledge required for the specific issue being studied; (b) are willing to participate; (c) have the time to participate; and (d) have effective communication skills (Adler & Ziglio, 1996). For this study, participants were required to hold at least one current credential related to the field of vocational evaluation and be actively engaged in the profession (e.g., practice, research, teaching). This type of purposeful sampling, along with subsequent screening for participant experience and credentials, enabled

researchers to target the desired population and adhere to the guidelines in the literature regarding the selection of experts. Recruitment for this study involved contacting memberships of the Vocational Evaluation and Career Assessment Professional (VECAP) association and Canadian Assessment, Vocational Evaluation and Work Adjustment Society (CAVEWAS), professional organizations whose members are vocational evaluation and career assessment professionals working in various settings. The first author received confirmation from association officials that VECAP and CAVEWAS sent the invitation to their members. Involvement in a professional organization shows investment in the field, which was desired of experts. The first author also contacted leadership from other vocational evaluation and career assessment professionals' organizations (e.g., International Association of Rehabilitation Professionals, American Board of Vocational Experts, Vocational Evaluation and Work Adjustment Association), requesting approval to distribute the survey to their memberships. The second and third authors and a contributor distributed the survey link and instructions to professionals likely to meet the inclusion criteria. This was done until the desired number of participants was reached, which took approximately four months.

While there is scant consensus in the literature regarding the exact number of experts that should be on a Delphi panel, several studies provide guidance. Hsu and Sandford (2007) indicate that a minimum of 10 and a maximum of 25 experts on a Delphi panel is adequate if the background of the expert group is generally uniform and the experts have the necessary experience and knowledge. To account for attrition

between Rounds, a target sample of no fewer than 20 experts was chosen to stay within the recommended expectations for a homogeneous panel (Hsu & Sanford, 2007).

Round One Instrument

The first survey was designed to gather demographic information about the panel, solicit initial quantitative ratings on the four definitions using Crow's (1975) framework, and collect open-ended opinions from experts regarding suggested changes to the definitions to be incorporated into Round Two. Before deploying the survey, it was reviewed by three experts in vocational evaluation, considering the research goals. These experts represented substantial levels of education and practice expertise in the field of vocational evaluation, as well as being credentialed (examples include CVE, ICVE, Professional Vocational Evaluator [PVE], Certified Rehabilitation Counselor [CRC] who practices vocational assessment). Feedback was provided on the survey's structure, wording revisions, clarification of the rating system, and ways to make the wording more inclusive for professionals practicing in a wide range of settings. Reviewer feedback was incorporated into the survey before it was deployed during the project's recruitment phase.

The survey used in Round One consisted of a consent process, eligibility questions, ratings, open-ended items, and demographic variables. Specifically, after participants provided consent, the survey first asked two eligibility questions to ensure that experts met the inclusion criteria (being credentialed and experienced) and to verify that prospective participants possessed the necessary credentialing and experience, indicating they had the unique expertise on the topic being studied. Next, the researchers provided the experts with background information and instructions for

the study. The background included the original definitions of vocational assessment presented in Dowd (1993) and a description of how the VECAP Standards Committee modified the 1993 definitions for the current study. The modified definitions were the definitions on which the current study is based. These definitions are provided in full in Table 1 (See Table 1).

Table 1
Original, Modified, and Resulting from Current Study

Level of Assessment	Original - Dowd, 1993	Used in Current Study - VECAP Standards Committee, 2023	Results of Current Study, 2024
Level One Assessment	The initial process designed to arrive at a decision for providing additional services. This assessment typically consists of interviews, limited psychometric testing, and the collection of background information.	An initial, individualized process designed to arrive at career decisions or determine the need to provide additional career assessment services. Examples of Level One assessment may include one or more of the following: file review, personal interview, interest assessment, limited administration, and interpretation of psychometric tests, etc. If additional information is needed to make effective career decisions after Level One services are completed, Level II or Level III services should be utilized.	An individualized process designed to arrive at decisions for career planning or determine the need to provide additional career assessment and/or other services. Examples of Level One assessment may include one or more of the following: records review, personal interview, limited administration and interpretation of career interest and other assessment instruments, etc. If additional information is needed for effective career planning after Level One services are completed, additional career

			assessment or other services should be considered. Also called screening assessment or needs assessment
Level Two Assessment	This intermediate process involves a detailed case study, in-depth vocational counseling, and/or psychometric test results. It may also include an analysis of transferable skills and job matching.	An intermediate, individualized process designed to clarify vocational functioning and arrive at career decisions or goals. It is a collaborative process between the practitioner and the participant. It involves a detailed case study, in-depth vocational counseling, and administration and interpretation of psychometric tests. It may also include limited work sampling, an analysis of transferable skills, and job matching. If additional information is needed to make effective career decisions after Level Two services are completed, Level Three services should be utilized.	Individualized process designed to clarify vocational functioning and arrive at career decisions or goals. It is a collaborative process between the practitioner and the participant. Involves in-depth career exploration and guidance, behavioral observation, and vocational interview. Involves assessment of interest, values, work readiness, and other personal and work-related characteristics. If additional information is needed for effective career planning after Level Two services are completed, additional career assessment or other services should be considered.
Level Three Assessment	The comprehensive process that systematically uses either real or simulated work as the focal point for assessment and	Comprehensive Career Assessment/Vocational Evaluation – A comprehensive, individualized process that systematically uses either real or simulated	A comprehensive and individualized process that systematically uses work-focused assessment techniques (e.g.,

	<p>vocational exploration; the purpose is to assist individuals in vocational development. The vocational evaluation process incorporates medical, psychological, social, vocational, educational, cultural, and economic data.</p>	<p>work as the focal point for assessment and exploration to clarify vocational functioning and arrive at career decisions or goals. It is a collaborative process between the practitioner and the participant that incorporates medical, psychological, social, vocational, educational, cultural, labor market, and economic data. It involves a detailed case study, in-depth vocational counseling, administration and interpretation of psychometric test results, and work-focused assessment techniques (e.g., work sampling, situational assessment, community-based assessment). The process culminates in individualized, prescriptive recommendations for career decisions or goals.</p>	<p>work sampling, situational assessment, community-based assessment) as a focal point for assessment and exploration. It is a collaborative process between the practitioner and the participant that incorporates medical, psychological, social, vocational, educational, cultural, labor market, and economic data. The process involves detailed records review and in-depth career exploration and guidance, behavioral observation, and vocational interview. The process culminates in individualized and specific recommendations for career decisions or quality-of-life goals.</p>
Vocational Assessment	<p>A comprehensive process conducted over a period of time, usually involving a multidisciplinary team ... with the purpose of identifying</p>	<p>An umbrella term that includes a range of professional services varying in intensity from screening to comprehensive, the purpose of which is to gather information to make personalized and</p>	<p>A systematic process, completed by a qualified professional, that uses methods and techniques with established efficacy to clarify vocational functioning and</p>

individual characteristics, education, training, and placement needs, serving as the basis for planning an individual's educational program, and which provides the individual with insight into vocational potential.

informed career decisions. Career Assessment is systematic and flexible. It is utilized in a variety of service settings (e.g., K-12 schools, vocational rehabilitation, workforce development, colleges, Social Security, workers' compensation, corrections). When the participant is an individual with a disability, functional aspects of disability are considered.

arrive at career decisions or goals. Assessment is flexible to the client's interests and abilities as well as the setting in which services are occurring. While the process typically is conceptualized with three levels (i.e., screening or needs assessment, exploratory, comprehensive) individual settings may not allow for movement between levels. Assessment is utilized in a variety of service settings (e.g., K-12 schools, vocational rehabilitation, workforce development, colleges, Social Security, workers compensation, corrections). When the participant is an individual with a disability, functional aspects of disability are considered.

*

Researchers asked participants to assess the appropriateness and priority of each segment of the Standards Committee definition using a 4-point scale (high, moderate,

low, not), indicating their level of agreement regarding inclusion in the final definition. Appropriateness (high appropriate, moderate appropriate, low appropriate, not appropriate) refers to the suitability of that word or phrase being included in the definition. For example, is it proper for the word or phrase to be included? Priority (high priority, moderate priority, low priority, not a priority) refers to the importance of the word or phrase being included in the definition. For example, a word may be appropriate but perhaps not a priority to include. See the Consensus Definition section for how ratings of appropriateness and priority were used in data analysis. Next, the participants were provided with two open-text boxes for comments. In the first, the participants were asked to comment on any aspect of the definition they had just rated. In addition, they were asked to be specific, including suggestions for improving the proposed definition, explaining any difficulty they had in evaluating particular aspects of the definition, and providing additional suggestions for rewording or revising. In the second open-text box, the participants were asked to provide general comments regarding the definition they had just reviewed. This format, which involves a rating and providing specific comments followed by general comments, was used for each of the four definitions. The last section solicited demographic information, that included gender, race/ethnicity, practice setting, referral sources for clients, country of practice, license/certification status, years of field experience, age, highest education level attained, whether vocational evaluation was a focal point of their degree program, and provision of an email address to receive the Round Two survey.

Round Two Instrument

The round two survey required participants to rate the same items presented in the round one survey for each of the four definitions. The round two survey had several additions. First, researchers provided participants with the aggregated data for each item rated in Round One (e.g., 90% highly appropriate) to allow participants to know how close or not each segment was to consensus building. Second, the Round Two survey included the revised items (see Data Analysis and Procedures section). The Round Two survey also had one textbox where participants were able to provide open ended comments regarding each proposed definition (four total in the Round Two survey, one textbox per definition) Finally, researchers asked participants the same demographic questions from Survey One, so we knew the demographics of the experts who participated in both Rounds.

Consensus Definition

In this study, researchers conceptualized consensus as an expression of consistency of viewpoints among experts (Hsu & Sandford, 2007), and the consensus level for each item in the study was defined as having at least 70% of the experts rating the item as “highly appropriate.” While there is no universally accepted scientific threshold for consensus level (Keeney et al., 2011), research in allied health care has proposed that 70% serves as a robust cutoff point for assessing consensus (Sumsion, 1998). Researchers generally maintained a 70% cutoff in this study. However, qualitative comments were considered for items within 5% of this cutoff to ensure that important statements were not excluded from the final definition. This approach helped prevent oversimplification in the definitions and ensured a distinction between

each, as indicated by the expert panel, and considers attrition. The instance is noted in the presentation of the results, where the 70% cutoff was not reached, but the statement was included in the final definition. Further, the research team determined in advance to delete any statements where 50% or more of participants rated the statement as “not appropriate” and/or “not a priority,” although no statements ended up receiving more than 50% rates of “not appropriate” and/or “not a priority.”

Data Analysis and Procedures

The research team analyzed each definition segment on a quantitative and qualitative basis. After Round One, any segment that either failed to achieve the required consensus or needed revision due to qualitative feedback was updated. Then, in Round Two, the original and revised segments were presented to experts, who were asked to rate both. For example, in Round One, the statement “*Designed to arrive at career decisions or determine the need to provide additional career assessment services*” reached 67% consensus, which was below the required 70%. Using themes from the qualitative data, the research team revised the statement to read: “*Designed to arrive at decisions for career planning or determine the need to provide additional career assessment and/or other services.*” In this example, experts in Round Two were asked to rate both the original and revised statements. The original statement consensus was reduced from 67% in Round One to 32% in Round Two, while the revised statement earned 70% consensus in Round Two. Revisions were informed by themes in the qualitative raw data. In the previous example, the theme in the qualitative data noted that many settings do not allow movement between levels and that other services, besides vocational assessment, may be warranted to assist the

individual. The researchers used the raw data themes to revise the statements for Round Two.

Results

In Round One, 72 individuals clicked on the survey participation link. Of the 72, one expert did not consent, and 71 consented. Eight of those who consented indicated that they did not meet the credentialing inclusion criteria. Of those meeting the credentialing inclusion criteria, one did not meet the experience inclusion criteria; the 62 eligible experts started the survey. Of the 62 who started the survey, 34 completed all responses to the survey in Round One. In Round Two, 21 experts completed the survey. The final panel of experts is 21. The mean age of the 21 experts was 55.53 years (SD = 11.08), and the mean years of experience was 22.5 years (SD = 10.63 years). Experts were overwhelmingly white females working in private for-profit settings within the United States (see Table 2).

Table 2

Demographics of Experts

Demographics	Number of Experts (%)
Gender	
Female	18 (85.71)
Male	3 (14.29)
Race/Ethnicity	
White	19 (90.47)
Hispanic/Latino	1 (4.77)

Other 1 (4.77)

Practice Setting

Private Practice (for profit) 13 (61.90)

Public Vocational Rehabilitation 3 (14.29)

K-12 Schools 2 (9.52)

Community Rehabilitation
Program 2 (9.52)

Other 1 (4.77)

**Referral sources for clients
you serve**

State/Federal Vocational
Rehabilitation 11 (52.38)

Students or Transition 2 (9.52)

Workers Compensation 2 (9.52)

Other, including: (community
rehabilitation program, motor
vehicle/medical legal, testimony
for earnings, VR private clients,
insurance companies, lawyers,
all, varies) 6 (28.57)

Country of Practice

United States 18 (85.71)

Canada 3 (14.29)

Primary Credentials

CRC, CVE, ICVE 3 (14.29)

CVE and ICVE 3 (14.29)

CRC and CVE 3 (14.29)

CRC 3 (14.29)

Canadian CVE 2 (9.52)

CRC, CVE, Licensed Counselor 2 (9.52)

ICVE 2 (9.52)

CVE 1 (4.77)

Certified Vocational
Rehabilitation Professional
(CVRP) 2 (9.52)

**Highest Level of Education
Completed**

Master's or Education Specialist 17 (80.95)

Doctorate 3 (14.29)

Bachelors 1 (4.77)

**Vocational assessment is a
focus of this degree**

Yes 13 (61.90)

No 8 (38.10)

For Level One, four statements met the quantitative consensus level for inclusion in the definition, three of which were revised statements (see Table 3). The original segment of the “initial process” or a revised version did not meet the quantitative consensus level and was not included. Examples of participant comments highlighting key themes that guided revisions included:

“In all cases this may not be the initial process so I think that part can be left off. Some know a level 3 is needed and the process starts there.”

“Additional information may be needed, but that information may not be obtained by a level II or III”

“File review” is outdated and should be modified.”

Table 3

Level One Definition Results

Level One Results	Round One*	Round Two*
Individualized Process	97%	100%
Initial Process	47%	50%
Revised statement – Least Intensive Process	X	50%
Designed to arrive at career decisions or determine the need to provide additional career assessment services	67%	32%
Revised statement - Designed to arrive at decisions for career planning or determine the need to provide additional career assessment and/or other services.	X	70%
Examples of Level One Assessment may include one or more of the following: file review, personal interview, interest assessment, limited administration, and interpretation of psychometric tests, etc.*	67%	60%
Revised statement - Examples of Level One Assessment may include one or more of the following: records review, personal interview, limited administration and interpretation of career interest and other assessment instruments etc.	X	90%
If additional information is needed to make effective career decisions after Level I services are completed, Level Two or Level Three services should be utilized.	67%	55%
Revised statement - If additional information is needed for effective career planning after Level One Services are completed, additional career assessment or other services should be considered.	X	86%

*Percentage reflects the percentage of experts who selected the statement as highly appropriate.

For the definition of Level Two, in Round One, 94% of participants agreed that the process should be individualized, and this increased to 100% in Round Two (see Table 4). Statements about the collaborative nature of the process received strong support, increasing from 91% in Round One to 100% in Round Two. Statements involving detailed case studies and in-depth vocational counseling saw significant drops in agreement, prompting revised statements. The revised statement about detailed records review gained 57% agreement, while the statement on in-depth career exploration and guidance achieved 81% agreement. Statements on limited work sampling and job matching saw declines, prompting revised statements. The revised statements on additional techniques, including limited work sampling and job matching, achieved 67% agreement in Round Two. Finally, the need for additional services after Level Two saw a drop from 61% in Round One to 30% in Round Two, but the revised statement on considering additional career assessment or services achieved 76% agreement. Examples of participant comments highlighting key themes that guided revisions included:

“Unclear what ‘case study’ means,..”

“Consider including observation of behaviors.”

“What about assessment of interests, values, knowledge of the world of work... those can also be part of Level 2.”

“Remember that not all evaluators/assessors are able to transition to different levels. At times the report goes directly to court, and those results are solidified.”

Table 4

Level Two Definition Results

Level Two Results	Round One*	Round Two*
Individualized Process	94%	100%
Intermediate Process	35%	24%
Revised statement - Moderately intensive process	X	35%
Designed to clarify vocational functioning and arrive at career decisions or goals.	82%	81%
It is a collaborative process between the practitioner and the participant.	91%	100%
Involves detailed case study	50%	19%
Revised statement - Involves detailed records review	X	57%
Involves in-depth vocational counseling	50%	15%
Revised statement - Involves in-depth career exploration and guidance, behavioral observation, and vocational interview	X	81%
Involves administration and interpretation of psychometric tests	79%	52%
Revised statement - Involves assessment of interest, values, work readiness, and other personal and work-related characteristics.	x	81%
May include limited work sampling	58%	25%
Revised statement - Examples of additional techniques that may be used include limited work sampling, simulated work tasks, or work-based assessment.	X	67%
May include an analysis of transferable skills	73%	62%
May include job matching	55%	29%
Revised statement - Examples of additional techniques that may be used include job matching and analysis of transferable skills.	X	67%
If additional information is needed to make effective career decisions after Level Two Services are completed, Level Three services should be utilized.	61%	30%
Revised statement - If additional information is needed for effective career planning after Level Two services are completed, additional career assessment or other services should be considered.	X	76%

*Percentage reflects the percentage of experts who selected the statement as highly appropriate.

For Level Three, 100% of the experts agreed that the definition should include the descriptors indicating a comprehensive and individualized process (see Table 5). A collaborative approach incorporating a variety of information about the client, detailed records review, career exploration, interviewing, and behavioral observation were also

statements that met the threshold for consensus. Experts also reached a consensus on the process culminating in specific career-related recommendations or quality-of-life goals. The statement regarding systematically using work-focused techniques as a focal point did not reach consensus in Round One and was revised to include some examples in Round Two (e.g., work sampling, situational assessment, community-based assessment). The revised statement did not reach the required threshold. However, the themes analysis showed the major distinction between Level Two and Level Three is work-focused assessment techniques (such as work sampling, situational assessment, community-based assessment). Also noted is that excluding the statements made Levels Two and Three indistinguishable. Based on the decision to use qualitative and quantitative data, the research team considered the qualitative data when making the decision to include the work-focused assessment technique in the final definition. Examples of participant comments highlighting key themes that guided revisions included:

“vocational counseling; again I'm stuck on this as someone that does mainly forensic work as I would not call it counseling but rather an interview, but it would be appropriate in social services setting”

“I think using the " work focused assessment techniques covers the real/simulated work- but would keep "systematic process ”

“The recommendations include so much more, including educational goals, employment supports (ex. job coaching, job development), assistive technology,

accommodations, additional evals, etc. I think this sentences should be expanded to include other types of recommendations.”

Table 5

Level Three Vocational Evaluation Results

Level Three Results	Round One*	Round Two*
Comprehensive process	97%	100%
Individualized process	91%	100%
Systematically uses either real or simulated work as a focal point for assessment and exploration	67%	33%
Revised statement - Systematically uses work-focused assessment techniques (e.g., work sampling, situational assessment, community-based assessment) as a focal point for assessment and exploration.	X	67%
Used to clarify vocational functioning and arrive at career decisions or goals	79%	40%
Revised statement - Used to clarify vocational functioning and arrive at career decisions and/or quality of life goals.	X	57 %
It is a collaborative process between the practitioner and the participant that incorporates medical, psychological, social, vocational, educational, cultural, labor market, and economic data.	91%	86 %
Involves a detailed case study	61%	25%
Revised statement - Involves detailed records review	X	71%
Involves in-depth vocational counseling	64%	29%
Revised statement - Involves in-depth career exploration and guidance, behavioral observation, and vocational interview	X	81%
Involves administration and interpretation of psychometric test results	67%	35%

Revised statement- Involves assessment of interest, values, work readiness, or other personal and work-related characteristics.	X	81%
Involves work-focused assessment techniques (e.g., work sampling, situational assessment, community-based assessment)	67 %	56%
Revised – delete this statement because this content was consolidated with a statement above	X	47%
Revised Statement (added because this content was not included in the original definition): Examples of additional techniques that may be used include job matching and analysis of transferable skills.	X	38%
The process culminates in individualized, prescriptive recommendations for career decisions or goals.	79%	48%
Revised Statement: The process culminates in individualized and specific recommendations for career decisions or quality-of-life goals.	X	71%

*Percentage reflects the percentage of experts that selected the statement as highly

Experts also provided ratings for the overall definition of vocational assessment and those results are presented in Table 6. Experts agreed that the overall definition of vocational assessment should include a statement that services vary, help clarify career decisions or goals, is flexible, should consider disability, must be completed by a qualified professional, and is typically conceptualized with three levels. Experts did not agree that the description should include the phrase *umbrella term* or *global term*. Examples of participant comments highlighting key themes that guided revisions included:

“Please keep in mind that even people with the most severe disabilities have a need for work or other productive activity, and vocational plans to achieve such

meaningful activities are essential even for the few people who may not be good candidates for paid employment.”

“For court purposes, I would make this definition a bit more broad. The words are too exact and will not fit most of our evaluations or assessments.”

“I like the mention here of systematic and flexible”

Table 6

Overall Definition of Vocational Assessment Results

Overall Result	Round One*	Round Two*
Umbrella term	55%	15%
Revised statement – Global term	X	63%
Includes a range of professional services	75%	79%
Services vary in intensity from screening to comprehensive	79%	26%
Revised statement - Services vary in intensity according to client needs and setting	X	84%
Used to clarify vocational functioning and arrive at career decisions or goals	91%	94%
Career assessment is systematic and flexible.	79%	36%
Revised statement - Career assessment and vocational evaluation is systematic using methods and techniques with established efficacy and flexible to the client's interests and abilities and the setting in which services occur.	X	79%
Career assessment is utilized in a variety of service settings (e.g., K-12 schools, vocational rehabilitation, workforce development, colleges, social security, workers compensation, corrections)	79%	68%

When the participant is an individual with a disability, functional aspects of disability are considered	85%	79%
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Revised statement: The process is completed by a qualified professional.	X	84%
Revised statement: While the process typically is conceptualized with three levels (i.e., screening, exploratory, comprehensive) individual settings <u>may not allow for movement between levels.</u>	X	74%

Discussion and Recommendations

Through this study, four definitions of vocational assessment received consensus from most participating experts. These definitions are for Level One vocational assessment, Level Two vocational assessment, Level Three vocational assessment, known as vocational evaluation, and, fourth, overall vocational assessment. The full definitions are listed in Table 1. The consensus on these definitions indicates that experts in the field recognize there are essential components that differentiate each subprocess and presume the anticipated outcomes. Key foci, processes, scope, and characteristics of each definition are summarized based on the responses from experts (see Table 7).

The study's experts agreed that vocational assessment may be implemented in settings where all levels of assessment cannot be available or utilized. For example, perhaps a one-time vocational assessment that includes a records review and interview may meet the objectives of that setting and meet that client's needs, while a more intense assessment would not be appropriate in that setting. These updated definitions include phrasing that accounts for individual differences between settings. Further, "comprehensive" is a subjective term, and that assessment should align with client needs, and some clients' needs may be met through lower levels of assessment. The

updated definitions account for these considerations.

The experts communicated another opinion: that assessment should include non-career goals, such as those related to quality of life. This addition parallels the suggestion to include quality of life as a potential rehabilitation service outcome (Fleming et al., 2013). The updated definitions include language that accounts for service outcomes that might not be limited to employment.

The study results regarding the use of work-focused assessment techniques (e.g., work sampling, situational assessment, community-based assessment) as a focal point for assessment and exploration in Level Three vocational evaluation require discussion. Specifically, the statement regarding work-focused assessment techniques did not meet the quantitative consensus threshold among experts (67% indicated the statement as highly appropriate), with a consensus level of 70% required. Then, in the qualitative comments, many experts noted that the lack of work-focused assessment techniques in level three would make distinguishing between levels 2 and 3 difficult. Additionally, and returning to the roots of vocational evaluation, experts have noted that work-focused techniques, such as work samples, situational assessments, and community-based assessments, help address some of the biases towards people with disabilities in traditional assessment strategies. Differences between Canada and the United States, as well as the limited number of individuals trained in traditional vocational evaluation (compared to those with rehabilitation counseling or related degrees), may have contributed to the lack of consensus on this issue. However, while researchers included this statement in the level 3 definition due to the support in the qualitative comments,

this issue needs further attention to avoid the miscommunication and confusion outlined in the introduction.

Two factors not broached in our study that need consideration are (1) work samples often lack psychometric properties (e.g., normative data) for interpretation of the results and (2) the cost to purchase these instruments can be prohibitive for most practices or they are time and labor intensive for vocational evaluators to create. At the same time, as mentioned in the introduction, these tools and other work-focused techniques can be helpful to address issues related to traditional assessment techniques when assessing people with disabilities and other marginalized groups. Regardless, there is a clear lack of agreement on the use of work-focused techniques in the field.

A review of the participants' demographics may warrant scrutiny of their ages and experience; the mean age of 55.5 and 22.5 years of experience could portend an aging out of the 21 expert participants. Clearly, this group meets the study's requirement for experts in the field. However, with all the changes in training and the lack of graduate programs focused on vocational evaluation, an important question to ask is if the views of these experts are representative of all vocational evaluation and career assessment professionals in the US and Canada. This point warrants further investigation to determine the opinions of individuals who have recently entered the vocational evaluation and career assessment professional field through non-traditional methods.

Table 7

*Summary of Focus, Process, Scope, and Key Characteristics of Vocational Assessment**Definitions*

Level	Focus	Process	Scope	Key Characteristics
Level One	Initial career planning or determining the need for further assessment	Limited to records review, personal interviews, and basic assessment instruments	Basic and preliminary, designed to decide if additional assessments or services are necessary.	Emphasizes a basic, individualized process to gather initial career planning information.
Level Two	Clarifying vocational functioning and making career decisions or setting career goals	In-depth career exploration, behavioral observation, and vocational interviews	Involving assessments of interests, values, work readiness, and personal/work-related characteristics.	Providing detailed guidance and exploration beyond initial screening.
Level Three	Detailed and thorough vocational assessment using work-focused techniques	Utilizes work sampling, situational assessment, community-based assessments, and incorporates a wide range of data (medical, psychological, social, etc.).	Comprehensive, considering multiple aspects of the client's life and culminating in specific career or quality-of-life recommendations.	Systematic and holistic, integrating extensive data and providing individualized recommendations.
Overall Definition (Systematic Professional Vocational Assessment)	Clarifying vocational functioning to make career decisions or	Flexible and adaptable to client interests, abilities, and service	Broad and applicable in various service settings (schools, vocational rehabilitation,	Performed by a qualified professional, adaptable to various contexts, and considers

set goals
using
established
methods.

settings;
includes
three
conceptual
levels but is
adaptable to
different
settings.

workforce
development,
etc.).

functional aspects
of disability when
relevant.

The results of this study can also have a significant impact from a policy standpoint. Isolating and distinguishing the various definitions of vocational assessment services has long been the topic of state policies (Johnson & Blakeney, 2006; Ahlers, et al, 2003). The lack of clarity and consensus has either been unknown to national policymakers, which resulted in the mistaken use of specific services required in federal laws or has caused omissions when writing policies. An example of this is evident in the reauthorization of the Rehabilitation Act of 1973, which is contained within the Workforce Innovation and Opportunity Act of 2014, Title IV, 29 U.S.C. §701 (2014). When defining assessment services for eligibility determination and individualized planning for employment, the act refers to “assessment” to describe the former and “comprehensive assessment” for the latter. VECAP and its partners could endeavor to educate Congressional members and staff about the differences between assessment and vocational assessment (i.e., vocational evaluation) and could recommend that the definitions from this study be included in the next reauthorization of the law.

VECAP, which supported the study, could send the findings to partners of the association, such as CAVEWAS, the American Board of Vocational Experts (ABVE), the

International Association of Rehabilitation Professionals (IARP), and the National Career Development Association (NCDA). The VECAP Advocacy Committee could develop a work plan around sharing the study results and invite boards to consider including the survey findings and newly revised service definitions in their publications. They could join VECAP when it advocates with the Rehabilitative Services Administration of the U.S. Department of Education, encouraging them to use the definitions in their policy papers and guidance. Additionally, the definitions could be utilized in VECAP's next request to meet with the Rehabilitation Services Administration (RSA) leadership to develop grant proposals for long-term training (graduate education) focused on vocational assessment and evaluation.

Another national dissemination strategy is to ask VECAP to share findings with the Council of State Administrators of Vocational Rehabilitation (CSAVR). Typically, they participate in federal policymaking and are responsible for implementing these policies in states and territories within the United States. Additionally, VECAP could request that CSAVR share these study findings in their weekly emails to the states and territories, as well as address the topic in a newsletter article or via presentations by the author(s) at one of their semi-annual meetings. Likewise, CAVEWAS's leadership could share the survey results with their members, the College of Vocational Rehabilitation Professionals (CVRP), and the National Vocational Rehabilitation Association (VRA of Canada). All of these and other dissemination activities should be repeated periodically to include professionals and policymakers who are new to their work. Eventually, the

new definitions could replace the old in future discussions, policies, education, and literature.

Since the primary author of this article is also the lead author of the VECAP Dictionary of Vocational Evaluation and Career Assessment, the study's new definitions have been included in the Dictionary. In fact, it would be useful for VECAP to notify vocational rehabilitation graduate education programs and state rehabilitation agencies (perhaps through CSAVR) about this Delphi study and the new Dictionary.

The experts communicated another opinion: that assessment should include non-career goals, such as those related to quality of life. This addition runs parallel with the suggestion to include quality of life as a potential rehabilitation service outcome (Fleming et al., 2013). Many findings and recommendations resulting from all three Levels of vocational assessment may, on the surface, appear to have nothing to do with RSA's mission for clients--to gain employment; however, many recommendations are justified by findings that point to the need for counseling, therapy, education, training, assistive technology(AT) assessment and acquisition of AT devices and training, that will improve employment opportunities. Participating in significant career exploration, gaining housing, medical assistance, food security, self-advocacy training, work hardening, and other services that may eventually enable recipients of vocational rehabilitation services to focus on employment are necessary first. The authors should consider publishing or referring to this study in professional journals of related professions, including those within rehabilitation and workforce development.

These definitions can be used to educate future vocational evaluators and career assessment professionals. Since no graduate programs are currently dedicated to training vocational evaluation professionals, many professionals entering the field of career assessment and vocational evaluation come from rehabilitation counseling and related areas of study. These definitions could be used by educators in those professions to guide the study of knowledge and skills necessary for competent practice at each level. To facilitate communication with college or university professors, VECAP needs to share the Delphi Study and Dictionary with the Council for Accreditation of Counseling and Related Educational Programs (CACREP).

The definitions that emerged from this study have utility in real-world settings such as K-12 schools and rehabilitation agencies. The differentiated processes and outcomes defined at each level can be used to provide guidelines for expected outcomes for users of services as well as accountability for those providing the services. For example, if a state agency outlined the different levels of vocational assessment in its menu of services, the rehabilitation counselor and client could make educated choices regarding the level that might best suit the client, especially when the agency uses a vendor to provide the vocational assessment services. In K-12 settings, special educators can use these differentiated levels to advocate for more intensive vocational assessment services that may not be provided within the school district. They also may use vocational assessment services as a meaningful part of age-appropriate transition assessment and planning. The terms defined in this study provide more clarity for

users of services, those referring to services, and those providing services, so they all can engage in the vocational assessment process in a way that meets individual needs.

Limitations and Future Research

The attrition rate from Round One to Round Two was substantial, potentially impacting the study's results. Future research could consider offering incentives to participants to enhance response rates and mitigate survey fatigue. Since the experts were primarily recruited through professional organizations, expert selection bias could influence the results as they may not represent the broader population of vocational evaluators, who may use outdated definitions of services or who may not be aware that the profession is striving for consistency. Future research could improve the study by employing unique procedures to mitigate selection bias, such as including individuals from diverse academic and experiential backgrounds or even involving end users in the process. As with any Delphi method, the process relies on the research team's judgment to analyze and synthesize expert opinions. While quantitative and qualitative methods were employed to mitigate some of that bias, the subjectivity of the researchers must be considered in the interpretation of the results.

Conclusions

In conclusion, vocational assessment is a broad term that can be harmful when used without additional context. This empirical Delphi study, conducted with experts in vocational assessment, has provided four distinct definitions to differentiate types of vocational assessment. This study's main contribution enhances understanding of the processes and outcomes involved in vocational assessment and emphasizes the

importance of clearly defining terms such as vocational assessment to avoid ambiguity and confusion.

As these practices continue to adapt to a changing world (e.g., technological advances, policies requiring services), these definitions will undoubtedly continue to evolve. The definitions emerging from this study will offer a foundation for future research and practice in vocational assessment and evaluation. Including the findings in graduate education programs, whether institution or RSA-funded, would aid the eventual adoption of the study's definitions

The processes and outcomes revealed in this study also indicate that qualified professionals are essential to implementing effective vocational assessment. In 2014, RSA acknowledged that vocational evaluators should possess skills and abilities to perform tasks unique to their profession. RSA published that

Vocational evaluators are trained to use labor market reviews, analyze job and training programs, assess work site accommodations, and conduct vocational profiles and reports. Evaluators examine the details of specific work opportunities for an individual with a disability, including the physical, academic, social, and emotional demands of the work environment in order to maximize the potential for an individual's long-term career success. (U.S Department of Education, pp. 27238-27239).

They added:

Although VR counselors receiving a master's degree in VR counseling may possess some of these specialized skills, they do not receive the breadth and

depth of training in these skill sets that an individual receiving a specialized degree or certification in vocational evaluation does (U.S. Department of Education, p. 27239).

This indicates that graduate training specifically designed for vocational evaluation is necessary, yet no such training has been available since 2014. Unfortunately, these descriptions were not included in the requests for proposals for grant-funded rehabilitation education graduate training.

In conclusion, the study underscores the ongoing evolution of vocational assessment practices. Specifically, there is a need to advocate for clear definitions, specialized training to carry out services properly, and integrating findings into curricula to serve better individuals seeking vocational assessment services without being unintentionally discriminatory.

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Appendix

Definitions Identified in the Study

Vocational assessment: a systematic process, completed by a qualified professional, that uses methods and techniques with established efficacy to clarify vocational functioning and arrive at career decisions or goals. Assessment is flexible to the client's interests and abilities as well as the setting in which services are occurring. While the process typically is conceptualized with three levels (i.e., screening, exploratory, comprehensive) individual settings may not allow for movement between levels. Assessment is utilized in a variety of service settings (e.g., K-12 schools, vocational rehabilitation, workforce development, colleges, Social Security, workers compensation, corrections). When the client is an individual with a disability, functional aspects of disability are considered

Level One vocational assessment (Level I): an individualized process designed to arrive at decisions for career planning or determine the need to provide additional career assessment and/or other services. Examples of Level 1 Assessment may include one or more of the following: records review, personal interview, limited administration and interpretation of career interest and other assessment instruments etc. If additional information is needed for effective career planning after Level I services are completed, additional career assessment or other services should be considered.

Level Two vocational assessment (Level II): an individualized process designed to clarify vocational functioning and arrive at career decisions or goals. It is a

collaborative process between the practitioner and the client. Involves in-depth career exploration and guidance, behavioral observation, and vocational interview. Involves assessment of interest, values, work readiness, and other personal and work-related characteristics. If additional information is needed for effective career planning after Level II services are completed, additional career assessment or other services should be considered

Level Three vocational assessment (Level III): a comprehensive and individualized process that systematically uses work-focused assessment techniques (e.g., work sampling, situational assessment, community-based assessment) as a focal point for assessment and exploration. It is a collaborative process between the practitioner and the client that incorporates medical, psychological, social, vocational, educational, cultural, labor market, and economic data. The process involves detailed records review and in-depth career exploration and guidance, behavioral observation, and vocational interview. The process culminates in individualized and specific recommendations for career decisions or quality-of-life goals.

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