



Reaction by Joe Ashley, RhD

Thank you for the opportunity to provide comments on the Delphi Study to Improve Agreement Regarding Vocational Assessment Terminology. I find the paper to be timely and important to the field of Vocational Assessment (VA) because it provides an important review and clarification of VA as a service offering. The authors correctly note the need to address the inconsistency in terminology around what constitutes a VA (p. 11), and this needs to be clarified and updated to make the service relevant to current providers and recipients. In addition, they note that Career Assessment (CA) and VA are sometimes used interchangeably (p. 8), which adds to the confusion around terminology. Clarifying the difference between VA and CA would be useful to referral sources and clients seeking services. The modified electronic Delphi Technique used by the authors seems reasonable for the paper's purpose. They note the importance of having updated terminology to clarify and communicate the value of VA to funders and partners to promote an informed use of VA services. Additional information on what a referral source can expect from each level of VA would be useful to communicate the value and relevance of VA services. Worth noting is that several organizations and services do not recognize the three levels of VA (p. 6), and this may have implications for future studies such as a critical review of the three levels of vocational assessment and surveying referral sources to determine if the new three-level framework is of value to them when selecting a service.

The authors point out that inconsistent definitions present challenges in several areas. For example, they note that confusion of terminology creates issues when conducting outcome research to develop evidence-based practice and when creating quality assurance indicators for VA service providers, both of which are critical needs for communicating the value of VA (p. 11). In addition, they point out that divergent understanding among professionals and policymakers of what constitutes a VA creates misunderstanding (p. 11). I would add, from professional experience, that the misunderstanding extends to referral organizations' and partners' awareness of the value of a VA (p. 11), which can result in services not being authorized. My experience discussing vocational evaluation (VE) with other VR and workforce professionals and their understanding of what constitutes a vocational assessment or evaluation is often vastly different. These differences can lead to VA not being considered an appropriate

service option, particularly when the perception is that a VA is a series of paper and pencil tests. VA can only help individuals with disabilities achieve their goals if the

assessments are a service option. Framing the study as an effort to improve agreement on the terminology of VA and to communicate this to partners is an appropriate first step. Using the VECAP Standards Committee modifications to the Dowd (1993) definitions for the three-level framework for vocational assessment was a good place to start (Vocational Evaluation and Career Assessment Professionals, 2024).

The revised definitions, while not expansive, have some significant differences. The inclusion of quality of life is one example. This is noted in the first paragraph, where the authors point out that vocational assessment "...can play a crucial role in facilitating favorable vocational outcomes and improved quality of life for individuals, particularly those with disabilities." (p. 8) The term Quality of Life is included in the new terminology as a VA outcome. The information on what constitutes a quality-of-life outcome is confusing (see p. 36). The examples noted are essential for IPE planning, but I do not find them to be quality-of-life indicators. Further explanation of the term as an outcome for VA is needed to clarify the point and its relevance to careers.

Keeping terminology updated is important, but it is equally important to reflect current practice. With the present-day focus on career pathways and evidence-based practice coupled with the paucity of research into VA service outcomes, advocating for the inclusion of VA/CA services in the future will be difficult without research to support VA as an evidence-based practice.

The steps outlined by the authors to promote VA with partners such as RSA and CSAVR are on target. However, I do not think the current study is enough to convince RSA or other workforce partners of the value of VA/CA until there is evidence to support the service leads to employment or choice of career pathways.

As noted above, the Delphi technique seemed to work, and the authors appropriately noted some areas that need future study, such as addressing the potential selection bias as seen in expert demographics (p. 37). Additionally, they point to a need to understand the lack of quantitative consensus around work-focused components (e.g., work samples, situational assessment, community-based assessment) often used in comprehensive vocational evaluation (p. 36); work-based services that are central to achieving career exploration and other goals critical to some partners.

The new terminology does not address Vocational Rehabilitations' (VR) and other WIOA partners' focus on career pathways and career services. For example, VR WIOA Pre-Employment Transition Services (Pre-ETS) requirements focus more on job exploration and work-based learning, leading to career decision-making (<https://transitionta.org/topics/pre-ets/>). Evaluators are well suited to provide career exploration experiences and information services that align with the services required by Pre-ETS. While the new VA terminology reflects career exploration and career interest in the second and third levels, the identified overall objectives remain assessment. A new service option that focuses on career exploration and other Pre-ETS career services would help referral sources understand the value of a career exploration-based service that is in line with Pre-ETS required services.

In summary, the authors provide a needed update to the three levels of vocational assessment. The Delphi technique is an appropriate mechanism for the study, but the

potential expert selection bias should be addressed if follow-up research is conducted. Future researchers should review the three-level vocational assessment framework to determine if it is still viable across referral sources and if it enhances understanding of the value of VA. Creating a specific career exploration-focused service option for different service levels would be a helpful next step to improve services for VR customers. Ensuring that all levels of VA services fully explain service outcomes may help communicate the value of VA services to referral sources and recipients. Promoting VA outcome research to support VA as an evidence-based practice would enhance the credibility of the VA as a service option and confidence in VA among national partners.

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Reaction by Brooke Austin, MS

Upon reading “A Delphi Study to Improve Agreement Regarding Vocational Assessment Terminology,” I was immediately struck by how much this study was needed within the profession of Vocational Evaluation and Career Assessment. I think this study certainly highlights the need for dedicated graduate programs and a consensus on terminology within the field of Vocational Assessment. As someone

tasked with training new evaluators, I find the lack of consistency within the field,

especially regarding terminology and processes, has been frustrating. It's difficult to impart what quality Vocational Evaluation services look like when there is no unified framework on which to look. This study made me feel hopeful for the future of the profession, as agreement on professional terminology amongst specialists within a given field is of the utmost importance to that field's survival.

Overall, this study elicited a feeling of optimism for the field of contemporary Vocational Assessment, especially when reading through its dissemination strategies. The continuing efforts to further the field of Vocational Assessment from organizations like VECAP and studies like this are of grave importance to the continuing advancement of Vocational Evaluation and Career Assessment.

I had a moment of reflection reading through the progression of the definitions for the different levels of Vocational Assessment. Beginning with Crow's 1975 Three Levels framework and ending with this study's findings shows much growth in the field of Vocational Assessment. Especially in reference to the study's experts noting that assessment recommendations and suggestions should include non-career goals. Many times, in my practice, there are specific needs that must be addressed before considering employment. I believe highlighting this trend in the study was valuable. I think it shows the level of thoughtfulness each evaluator puts into their assessments and better encompasses the holistic approach most assessment professionals bring to their evaluations.

In conclusion, this study has come at a time when consensus among Vocational Evaluation and Career Assessment professionals is essential. I believe this study is the first step toward unifying our field, and I look forward to seeing continuing efforts to advance vocational evaluation and career assessment in the future.

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Reaction by Michael O'Brien, EdD, CRC, CVE

Vocational evaluation and vocational assessment should be essential to vocational rehabilitation practice. Both can contribute to the success of participants by helping them make effective, informed decisions prior to beginning a pathway to employment. The research conducted by McCarthy, Boen, Leconte, and Smelser (2024) does an exceptional job of defining levels of service and pathways for contributions that vocational assessment can make for individuals choosing careers. It also helps clarify

for professionals who might seek these services for their consumers ways of choosing

the level of service that will best meet the needs of the consumers they will refer. Overall, I have significant agreement with the conclusions of the article. However, I think there are three significant areas that were not adequately addressed.

The Workforce Innovation and Opportunity Act (WIOA) added a significant area of new practice in vocational rehabilitation by mandating pre-employment transition services (Pre-ETS) as part of the required services for state vocational rehabilitation agencies. Yes, transition services were provided prior to WIOA, but WIOA provided a new area of services for students with disabilities that occur prior to application for vocational rehabilitation. There are five mandated services: job exploration counseling, work-based learning, counseling on post-secondary education opportunities, workplace readiness training, and self-advocacy. The first three of these lend themselves to vocational assessment and likely fit into level one or two of the proposed levels of assessment and should be addressed as part of the research and conclusions for this article.

Prior to this article, the seminal work in vocational evaluation was the 30th *Institute on Rehabilitation Issues: A New Paradigm for Vocational Evaluation: Empowering the VR Consumer Through Vocational Evaluation*. It also addressed three levels of assessment as well as various arenas of practice and historical development of the profession. In particular, it added discussions about assistive technology, language and communication factors in vocational evaluation, and transition evaluation. Failure to include this information in the literature review and as part of the skills utilized in assessment is a limitation of the study.

Vocational evaluation and vocational assessment are not interchangeable terms. In the *Glossary of Terms for Vocational Assessment, Evaluation, and Work Adjustment*, edited and revised by Lynn Dowd (1993) and approved by the Vocational Evaluation and Work Adjustment Association, vocational evaluation includes the addition of “real or simulated work” as part of the evaluation process. Additionally, *The 30th IRI: A New Paradigm for Vocational Evaluation*, identifies evaluation and assessment as unique practices. Based on the levels of assessment identified in this article, levels two and three would more accurately reflect vocational evaluation practice. Minimizing the role of real or simulated work as part of the unique and special skills of vocational evaluation is unfortunate. The challenge, of course, is that many other professions provide vocational assessment for people with disabilities. There is a significant challenge because of the limited number of highly qualified vocational evaluation specialists; however, somehow equating the two practices as equivalent is a mischaracterization. We should not bring evaluation practice back to the middle of the road with an overall description of the two practices as somehow the same. It remains important to identify evaluation as unique with the inclusion of real or simulated work as a meaningful part of services. Failure of the terms vocational evaluation and work-based assessment to reach the quantitative threshold from study participants for inclusion in the study suggests further exploration is needed.

This is an important article. It makes significant recommendations regarding the future of vocational assessment and services for people with disabilities and recognizes the potential value of vocational assessment for all people making career decisions. The

research methods and conclusions are a significant step in the right direction. Additional studies are needed to develop a distinct understanding of vocational assessment and vocational evaluation practice.

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Reaction by Francois Paradis, MA, CVE, CCVE, ICVE

My reaction to the Delphi study itself was positive overall. I think the Delphi process was a good method to establish the degree of consensus among experts. However, I think it would have been preferable to get more expert reviewers from Canada, to provide a more balanced view of vocational concepts, as the practice of vocational evaluation differs between our two countries.

Following are my reactions to some of the concepts raised in this study paper.

The study's introduction identifies five areas served by vocational assessment. I would add the forensic area, which serves, among other things, personal injury, marital, and medical malpractice adjudication. Additionally, the authors posit that vocational evaluation grew out of a need for "...assessing individuals' abilities and aptitudes..." I think these two concepts are pretty close in meaning. I would replace them with skills and abilities.

The authors state "*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 (p. 9)." In my experience, unfortunately, the experiential aspect has lost ground over the years. Many VEs in Canada no longer use work samples or simulated work to assess a person's employability. For the most part, psychometric testing is relied upon. Nowadays, the use of simulated work is more often used by occupational therapists. For the same reason, in my experience, most VEs do not have the skill and training to create work

samples. Those that use work samples typically rely on commercial work samples.

I note the authors' statement, "...*Vocational evaluators, however, are not the only professionals who provide vocational assessment...* (p. 10)." In Canada, vocational evaluations are also conducted by non-VEs, including occupational therapists, chiropractors, psychologists, etc., with varying quality. This, in part, results from the fact that our profession is not regulated and that vocational evaluation is not a restricted act that requires specific qualifications. If only VEs could do what we do, more people would seek certification.

The authors state "...*Professionals, clients/participants, educators, employers, and policymakers may have divergent understandings of what constitutes vocational assessment...* (p. 11)." This is very true. I have been doing vocational evaluations for more than 20 years, and I think one of the biggest issues is the lack of understanding among our clients about our scope of practice. In my experience providing vocational evaluations for insurance companies, for example, I have been subjected to systematic pressure to take a very narrow view when providing vocational recommendations (e.g., strictly based on test scores or education/work history) and to defer to medical doctors on the suitability of recommended occupations. I still encounter many defense reports where the VE does not take into account medical data to determine if an occupation is suitable and, rather, defers to medical practitioners, who, in turn, do not have proper vocational training to render such an opinion. Many such VEs are certified with the College of Vocational Rehabilitation Professionals (CVRP), but a misunderstanding about our own scope of practice persists in our profession.

In the listing of round three results (Table 5; pp.32-33), I found the following three statements to be of interest:

- "...Systematically uses either real or simulated work as a focal point for assessment and exploration..." This statement only received a 33% consensus in round two. I think this reflects my earlier statement that real or simulated work is no longer a focal point of vocational evaluation, at least in Canada.
- "...*Involves administration and interpretation of psychometric test results...*" I am surprised this statement only received a 35% consensus in round two, as I think it is an integral part of a level III vocational evaluation.
- "...*Examples of additional techniques that may be used include job matching and analysis of transferable skills...*" I'm surprised this statement only received a 38% consensus in round two. In Canada at least, and as per CVRP, the protocol for a vocational evaluation is to include a transferable skills analysis in vocational evaluation.

This concludes my reaction to this Delphi study.

Francois Paradis, MA, MA, CVE, CCVE, ICVE. I am a certified vocational evaluator with over 22 years of experience in the field of vocational evaluation. I provide vocational evaluation services in the Greater Toronto Area for legal firms and Auto/Health Insurers. I completed a Master of Art in Guidance Counselling at Laval University in Quebec in 1995. I obtained a GATB administrator certification in 2002, became a Certified Vocational Evaluator (CVE) in 2006 and a Certified Valpar Operator

in 2009. I have obtained a Vocational Professional Master's certificate and am certified as a Canadian Certified Vocational Evaluator (CCVE) and International Certified Vocational Evaluator (ICVE). I have been accepted as a qualified expert in Vocational Assessments and Transferable Skills Analysis in the Ontario Superior Court of Justice. I am a member in good standing of the Canadian Association for Vocational Evaluation and Work Adjustment Society (CAVEWAS) as well as VRA Canada. I have served on CAVEWAS' board of Directors from 2013 to 2024.

Reaction by Paige Rose-Merrifield, MS, CESP

The study shed some light on areas of inconsistencies with vocational assessment resulting from gaps in education and credentialing and deemphasized funding priorities.

McCarthy, Boen, Leconte, and Smelser (2024) aimed to establish distinct definitions of vocational assessment and vocational evaluation to promote consistency in research, practice, policy, and advocacy. The report also sought to improve consensus on 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.

The study's findings were not surprising, given the significant variability among practitioners and settings in terms of the types, quality, and intensity of vocational assessment terminology used. Furthermore, the use and implementation of vocational assessment varies depending on the characteristics and type of individual being served, available resources, 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 set apart vocational evaluation from other types of vocational assessment may no longer be the case (McDaniel, 1988).

I find it concerning that an individual may only have the opportunity for a community-based assessment from a practitioner eligible to conduct a Level Three Assessment. Community-based assessments allow for the most authentic way to try out and demonstrate skills, ability, and capability. Subsequently, I would be irresponsible not to point out indicators contributing to the threat of unsustainable numbers of qualified vocational assessment providers:

- a) Thirty years lapsed between Dowd's (1993) original definitions of vocational assessment based on Crow's (1975) framework and the VECAP Standards Committee 2023 clarification,
- b) Crow's (1975) Three Levels framework is not widely used, especially outside of vocational rehabilitation services,
- c) no dedicated graduate degree programs exist (since 2014),
- d) no agreed-upon credentialing standard, and
- e) the scope of vocational evaluation has lessened.

I appreciated the authors' historical evolution of vocational assessment and the recommendations provided for future research and practice. They suggest that graduate education programs and RSA-funded sponsorships for research and practice receive priority as assessment practices continue to evolve. With staff aging out and reduced hiring and retention capacity attributing to that reality, the need has become urgent. The authors not only identify a need for common terminology but also suggest that VECAP and its partners could endeavor to educate Congressional members and staff about the differences between assessment and vocational assessment. They could recommend that the definitions from this study be included in the next reauthorization of the law. Additional stakeholders may include professional organizations, credentialing authorities, technical assistance centers, and graduate programs housing rehabilitation services.

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providers (CRPs) focused on training and technical assistance. She has strong knowledge in the areas of cross-agency collaboration, vocational assessment and career planning, employer engagement, pre-employment transition services, Progressive Employment practices, and DEIA (Diversity, Equity, Inclusion, & Accessibility) leadership. Paige has 24 years of experience as a VR Counselor, Evaluator, and Program Director of Evaluation and Community Integration with Nebraska VR.