

CBA Final/Exit Summary Example #1

(when a CBA is monitored by a Job Developer or Job Coach)

Participant: John Doe
 Case ID#: xxxxx
 Counselor: _____
 Evaluation Dates: 9/1/13 – 9/30/13

CBA Site: ABC Furniture Store
 Type of Work: Warehouse
 Monitored by: Mary Smith, Job Developer
 Report Date: 10/5/13

Work Schedule	Mon – Fri 1:00pm – 5:00pm Total hours: 80
Job Duties	Assembled small furniture, loaded and unloaded delivery trucks, stocked shelves, climbed ladders, used hand tools, assisted with maintenance and janitorial duties
Attendance	John only missed one day of his 4-week assessment due to illness. However, he did telephone his supervisor before his shift started that day.
Punctuality	John was late the 2 nd day of his assessment because of the bus. From that day on, he began taking an earlier bus and he was always on time or early for his shift after that.
Appearance/ Grooming/Hygiene	John wore a dress shirt and tie for his intake and presented a professional appearance. He was always neat and clean looking when he showed up for work and wore clean clothes.
Cooperation/ Following Instructions and Rules	John was very cooperative. He always wore his steel-toed boots, and other protective gear (safety glasses, etc.) when required. He paid attention to the time when on his 15-min. break. If he didn't understand something, he did not hesitate to ask questions.
Working Relationships	John is very out-going and wanted to "make friends" with everyone at work. His supervisor had to speak with him several times during the first week about talking too much and distracting his co-workers. But by the 2 nd week, John was much more focused on his work and spent less time trying to socialize.
Work Quality /Quantity	John proved to be a hard worker. Once he understood how to do something and what was expected of him he performed all of his job duties accurately and with pride. His pace was somewhat slow at first but as he gained confidence in what he was doing he became more efficient and productive. He took initiative and was always willing to "pitch in" where needed.
Stamina	John doesn't have any physical limitations and had good stamina throughout the assessment.
Learning Job Duties / Accommodations	John learned his job duties more quickly when he was first provided verbal instruction while watching and asking questions, and then given one-on-one hands-on instruction. Detailed written instructions did not help him, although he liked using short checklists so he knew he didn't omit any steps in whatever job task he was doing. John was most productive when he worked on only one or two different types of job tasks each day.

Recommendations/Issues: John's least favorite part of the assessment was helping out with janitorial duties. But he enjoyed everything else and would make an excellent employee in a warehouse setting once he "learned all the ropes." John has expressed interest in forklift training. I think he would do well if the instructor could spend a little extra time with him and it would make John even more employable.

CBA Final / Exit Summary Report Example #2
(when a CBA is monitored by a Job Developer or Job Coach)

CBA SUMMARY / RECOMMENDATIONS

Participant: John Doe **Job Site/Job Title:** ABC Furniture Store
Case ID#: xxxxx **Type of Work:** Warehouse
Counselor: _____ **Monitored by:** Mary Smith, Job Developer
Evaluation Dates: 9/1/13 – 9/30/13 **Report Date:** 10/5/13

Work schedule / Total # of Hours Worked: 1:00pm – 5:00pm M-F 80 hours total

Work duties: Loaded and unloaded delivery trucks, assembled small furniture, stocked shelves, assisted with maintenance and janitorial duties, climbed ladders, used hand tools

****Summary or explanation required for all categories below****

Attendance:

No time missed

of days or hours missed: 1 day

Reason for time missed: illness

Called/Excused, if absent: Yes No

Explanation: John telephoned his supervisor before his shift started that day.

Punctuality:

Arrived at work and returned from lunch/breaks on time every day

Late: Minimally Consistently

Reason (acceptable to average employer?) bus was late

Called to inform of lateness: Yes No

Explanation: John was late the 2nd day of his assessment. From that day on, he began taking an earlier bus and was always on time or early for his shift after that.

Appearance / Grooming / Hygiene:

Exceeded expectations

Met expectations

Below expectations

Summary: John wore a dress shirt and tie for his intake and presented a professional appearance. He was always neat and well groomed when he showed up for work, wore clean clothes and followed the dress code.

Cooperation / Following Supervisory Instructions and Workplace Rules:

Exceeded expectations

Met expectations

Below expectations

Summary: John was very cooperative. He always wore his steel-toes boots, and other protective gear (safety glasses) when required. He paid attention to the time when on his 15-min. break. If he didn't understand something, he did not hesitate to ask questions.

Working Relationships: (e.g., interactions, helpfulness, positive attitude, teamwork)

- Exceeded expectations
- Met expectations
- Below expectations

Summary: John is very out-going and wanted to “make friends” with everyone at work. His supervisor had to speak with him several times the first week about talking too much and distracting his co-workers. But by the 2nd week John was much more focused on his work and spent less time trying to socialize. By the 3rd week, John was taking initiative and “pitching in” where needed.

Learning Job Duties:

- Exceeded expectations
- Met expectations
- Below expectations

Summary: John learned his job duties more quickly when he was first provided verbal instruction while watching and asking questions, and then given one-on-one hands-on instruction. Detailed written instructions did not help him but he liked using short checklists so he knew he didn’t omit any steps in whatever job task he was doing.

Work Quality / Quantity:

- Exceeded expectations
- Met expectations
- Below expectations

Summary: John proved to be a hard worker. Once he understood how to do something and what was expected of him he performed all of his job duties accurately and with pride. His pace was somewhat slow at first but as he gained confidence in what he was doing he became more efficient and productive. John was most productive when he worked on only one or two different types of job tasks each day.

Stamina: John doesn’t have any physical limitations and demonstrated good stamina for physically demanding full-time work.

Accommodations Needs: Visual, hands-on instruction. Short check lists of job duties and workplace rules. Gets flustered if he’s pulled from one job task to another too often, therefore works best on “longer assignments.”

Identified Work Skills & Other Client Strengths: Physically strong, knows how to use most hand tools, not afraid of heights, safety conscious, follows instructions, accepts supervision, wants to do things “the right way.” John would be an excellent employee in a warehouse setting once he “learns all the ropes.”

Recommendations, Issues, & Other Relevant Comments: John’s least favorite part of the assessment was helping out with janitorial duties. John has expressed interest in attending forklift training. I think he would do well if the instructor could spend a little extra time with him and it would make John even more employable.