

SYRACUSE UNIVERSITY  
TRAINING INSTITUTE FOR HUMAN SERVICE PLANNING, LEADERSHIP AND  
CHANGE AGENCY  
Room 301 Huntington Hall  
Syracuse University  
Syracuse, NY 13244 USA  
Telephone: 1-315-443-5257

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## **DESCRIPTION OF A TYPICAL PASSING WORKSHOP**

This narrative is intended to be complementary to another document called, "Overview of PASSING" that explains the PASSING tool itself, and Social Role Valorization (SRV) on which it is based.

There are different ways of teaching PASSING. This is a description of a typical 4 ½ to 5 day introductory PASSING workshop that involves participants in field experiences with two practicum service sites, as explained below. For information on upcoming PASSING workshops (dates, places, etc.) contact the Training Coordinator at the address above, or you can take a look at the training calendar at [www.socialrolevalorization.com](http://www.socialrolevalorization.com).

This workshop introduces trainees to the third (2007) edition of PASSING, which is a method for quantitatively and objectively assessing the Social Role Valorization-based quality of a human service. PASSING is especially applicable to services to impaired and/or other societally devalued persons, e.g., community residences, nursing homes, institutions, child development centers, special education programs, work-study programs, workshops, on-the-job training, psychiatric clinics, rehabilitation settings, welfare programs, etc. Settings such as these – but of a relatively uncomplicated nature – are evaluated by participants as part of an introductory PASSING workshop.

The usual primary goals of such a workshop are to: (a) train participants on the implications of SRV to all human services; (b) enable participants to begin to develop competency as evaluators of service quality; (c) learn how to evaluate services against SRV criteria; (d) begin to identify and train potential evaluators and leaders for later training and implementation of SRV and PASSING; and, in some cases, (e) provide a common orientation to service quality and evaluation to people from the same agency or locale.

All participants at PASSING must first have participated in introductory training in SRV that usually takes three days, because an Introductory PASSING workshop is really advanced SRV training, and familiarity with SRV is taken for granted. Participants without SRV training would not understand the rationales behind some

of the PASSING ratings, and would not apply PASSING properly. All participants should also have read the 2013 monograph by Wolfensberger that explains SRV, *A Brief Introduction to Social Role Valorization: A High Order Concept for Addressing the Plight of Societally Devalued People, and for Structuring Human Services*, available from the Valor Institute ([www.instvalor.ca](http://www.instvalor.ca)).

A PASSING workshop is conducted under the direction of a person highly experienced in and with PASSING, usually assisted by at least one other person of the same, or nearly the same, skill. These people are also called “floaters” because they will “float” over several teams as each team does its work. Either before the workshop begins, or soon thereafter, registrants are assigned to small teams in preparation for the visits to the services to be assessed, which are called “practicum sites.” Each team is under the direction of a team leader, who is a qualified individual who has had previous training or experience in PASSING. The team leaders are responsible for their teams’ arrangements during the PASSING workshop, including the practicum site visits and the conciliation sessions, explained below.

At least part of the morning of the first workshop day is taken up with plenary lectures reviewing PASSING’s structure, the guidelines for its application, how participants are to comport themselves during the site visits, and possibly examination of some of the more difficult rating issues in PASSING. At the conclusion of the lecture presentations, teams meet to prepare for their practicum assessments.

Each team usually assesses two practicum sites. The first is usually a residential service, and the second is usually some type of non-residential day program: educational, habilitational, occupational, recreational, etc. Teams begin their practical assessments in the late morning or afternoon of the first day. In order to conduct a PASSING assessment, team members must have access to many and varied sources of information about the service, including documentary materials on it (usually provided in advance); interviews with representatives and recipients of services, and possibly others who may have relevant information; and observation of the program in operation.

A typical schedule of a practicum assessment is as follows. If at all possible, even prior to the workshop, team members receive documentation on the two services they will assess so that they can do some advance reading. In the first team meeting, the team leader clarifies roles, responsibilities, and expectations for all team members, and the assessment schedule. Then, after (additional) reading of documentary materials on the service, the team makes a tour of the neighborhood surrounding the first practicum service typically by car, and occasionally on foot. Then, the team conducts a detailed interview of several hours with responsible service personnel, such as the director, program administrators, direct service workers, and sometimes one or more board members. The team then observes the program in operation, and if conditions permit, have a meal with the service

recipients. At some point, the team is given a guided tour through the setting. The team may examine yet additional documentary material that it may have discovered, and speak with service recipients and servers. These activities continue through the evening of the first day. If necessary, the team may continue its assessment activities beginning early on the morning of the second day, such as further interviews and/or site visits, review of documentation about the service, observation of the program in operation, etc.

After having collected as much information on the service as the limited time of a practicum permits (real evaluations take much longer), each team member spends 2 to 3 hours privately reviewing all the collected information and determining his/her individual judgment of the service's performance on each of 42 service dimensions ("ratings") assessed by PASSING. Each rating has five levels. Level 1 represents the poorest level of performance, and Level 5 represents the optimal level of service quality on an issue, with Levels 2, 3 and 4 representing intermediate levels between these.

After each team member has completed the individual assignments of rating levels, the team begins a lengthy intra-team discussion (called "conciliation") on the service. Conciliation starts with a lengthy "foundation discussion" on what the service is and does, and who the people are whom it serves: what they are like, what defines them, what they need. (PASSING teams are privileged in this regard, because so many services never spend as much time looking in a structured, prolonged, and theory-guided collected context at the existential identities of the people they serve, and their needs.) The team then determines the service's performance on the 42 ratings, attempting to reach a consensus judgment on each rating. In light of the team's total evidence, team members will sometimes have to change their minds about a level that they had previously considered to be correct during their private, individual, and preliminary level assignments. Because for practicum assessments, team leaders are responsible for preparing written feedback to each assessed service, and because the team leaders are already trained in PASSING, they carry the final responsibility for deciding which of the five levels to assign to a service on a rating. Each team leader may be assisted by one or more team members who have been designated to help record the team's findings and recommendations. (For such recording, several forms exist which may be used to provide information to the assessed services about their performance on the evaluation.)

After the team has discussed and analyzed all of its observations and other information in light of the 42 PASSING ratings, then it formulates the major strengths of the service as it perceives them, the major weaknesses, and the major overarching issues that affect a great many specific things that go on in the service, and the major recommendations (and possibly also the minor ones) that can be offered to the service.

All of this is an abbreviated version of what teams would do for and during a real assessment, in contrast to a practical training assessment. Also, in a real assessment, where the team members would all be qualified evaluators, the team leader does not have a deciding vote on the rating levels.

With the exception of the evening visit, a similar schedule is followed on the next two days for the team's assessment of the second practicum site.

Sometime during the last day of the workshop, participants from all the teams reconvene into plenary session in order to hear, and learn from, reports from each team, clarify final points on PASSING, and provide feedback on the assessment and workshop. Each team leader is usually responsible for developing and making an oral report of his or her team's assessments to the plenary group. To the degree that time allows, the team as a whole assists in the preparation of the presentation, as directed by the team leader. In real assessments, there may also be a preliminary oral report by the entire team to the senior members of the service. For practicum assessments during training workshops, this is discouraged because it takes too much time, and because oral reports hastily prepared are apt to lack quality and completeness, and yet are taken very seriously by the assessed service. After the workshop, the team leader is supposed to deliver a written report for editing by the workshop leaders, and the final version of this report is supposed to be distributed to the assessed service, and to all team members.

By itself, an introductory PASSING workshop will not qualify many trainees to be full-fledged PASSING evaluators. It is entirely to be expected that most persons will require more PASSING and/or other training before that can perform as a qualified evaluator in real-life PASSING assessments of different types of services, or as a team leader in a future PASSING workshop.

PASSING workshops are physically, intellectually, and sometimes emotionally demanding. Therefore, participants are asked to arrive well rested, and plan to forego all outside involvements during the days and nights of the workshop. These workshops have proven to be among the more demanding ones that participants have attended. At the same time, there has been little dissatisfaction with this fact. Although there have been some complaints that this expectancy was not properly clarified in advance. Thus, at various times, participants have arrived with the erroneous expectation of being able to master the workshop while only attending on a part-time basis, or spending evening sight-seeing, enjoying themselves with their families, etc. Some participants arrived at PASSING exhausted from work during the preceding days, and did not have the necessary reserves of energy and stamina to benefit optimally, or even endure through all parts of the practicum process.

Participants must also anticipate that there is no single optimal structure for everyone and everything, and some trade-off in individual benefit is reasonable for the sake of maximal benefits to the maximum number of participants and the purpose of the workshop.

As noted, full participation in a previous Introductory SRV workshop is a prerequisite to attending a PASSING event. At an Introductory SRV workshop, participants at PASSING will already have learned that SRV can help people enormously in doing the right thing, but that it cannot be expected to “fix” human services. Neither can PASSING. Rather, PASSING teaches one to see more clearly how well or how poorly a service is implementing the various implications of SRV. It may also shed light on practices in entire fields. Thereby PASSING teaches both SRV, as well as how to understand and evaluate services, and even how to construct them. A PASSING workshop usually also provides much insight into the larger societal and human service system contexts that determine how any specific service works. Participants should be able to leave a PASSING workshop more competent in SRV, but not necessarily armed to fix their own (or any) human services when they return home. As participants at PASSING events often discover, there are tremendous incentives for services to do things that are contrary to SRV, and the interests of their recipients, and many obstacles to their doing things that are consistent with SRV and good for their recipients. To the degree that this is true, this reality should not be taken as evidence that SRV is faulty, but rather, that there is something very wrong with the structuring of contemporary human service systems.

Yet further, because participants will visit and study two existing services with real recipients, they are apt to be confronted in a very direct way with some very fundamental realities about the lives of wounded people, and about the limitations of human services. Thus, participants should come prepared to have some very deep questions of values and beliefs raised by the workshop experience that go beyond the scope of SRV, and which this workshop is neither intended nor capable of resolving.

#### POTENTIAL PARTICIPANTS:

The typical PASSING workshop is aimed at persons who are or aspire to be leaders in human services, especially in their local area, and especially in bringing about adaptive service change. Additionally, the workshop is intended to support individuals who are, or are likely to become, committed to SRV and its implications for human services, and who are interested in a long-term process of assessing and/or improving local human services according to SRV principles. Potentially, many such individuals will be interested and able to develop beyond PASSING ratership competency, and become PASSING team leaders or even PASSING teachers and trainers.

#### PREREQUISITES:

1. Participants must first have been to a full-length (at least 3 day) Introductory SRV workshop

2. Prior to training, participants must have read the 2007 PASSING Ratings Manual, and the relevant parts of the 1983 Guidelines for Evaluators During a PASS, PASSING or similar Assessment of Human Service Quality, because the workshop will not explicitly teach the materials contained in these two volumes. Since familiarity with these two volumes is taken for granted, in order to participate in a PASSING assessment, participants will receive little benefit if they have not done the requisite preparatory reading and study, and on top of that, they may obstruct the progress of other participants. Participants are responsible for having a copy of each book with them throughout the entire workshop.
3. Participants must arrive in time to attend the opening session, and must plan to stay throughout the entire workshop, which includes 4 evenings.

#### FURTHER TRAINING:

There are other workshops that are logical follow-ups to an Introductory PASSING workshop, including (a) workshops on evaluating services that are difficult to assess, (b) workshops on the use of instruments for evaluating more complex, or non-programmatic aspects of a service, and (c) workshops not related to evaluation, but to the issues that often become matters of intensive debate in evaluation teams.

#### REFERENCE:

Wolfensberger, W., & Thomas, S. (2007). PASSING. A tool for analyzing service quality according to Social Role Valorization criteria. Ratings manual (3rd rev. ed.) Syracuse, NY: Training Institute for Human Service Planning, Leadership, & Change Agency (Syracuse University)