Training and Technical Assistance for Providers **T-TAP**

Community Rehabilitation Programs and Organizational Change:

A Mentor Guide to Increase Customized Employment Outcomes

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2007

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This manual was developed by T-TAP, funded by a cooperative agreement from the U.S. Department of Labor, Office of Disability Employment Policy (#E-9-4-2-01217). The opinions expressed herein do not necessarily reflect the position or policy of the U.S. Department of Labor, nor does the mention of trade names, commercial products, or organizations imply endorsement by the U.S. Department or Labor.

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U.S. Department of Labor

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SECTION 1

OVERVIEW OF T-TAP MENTOR GUIDE

In 2002, the U.S. Department of Labor, Office of Disability Employment Policy (ODEP) announced the availability of funds to support a National Training Technical Assistance for Providers (T-TAP) project. The goal of the project was to assist community rehabilitation providers (CRPs) in facilitating integrated employment / customized employment outcomes for individuals served by these programs. Virginia Commonwealth University (VCU) in partnership with the Institute for Community Inclusion (ICI) at the University of Massachusetts Boston submitted a proposal and was awarded the cooperative agreement in October of 2002.

For the purpose of this Guide, customized employment is defined as a process for individualizing the employment relationship between an employee and an employer in ways that meet the needs of both. Customized employment is based on an individualized negotiation between the strengths, conditions and interests of the person with a disability and the identified business needs of the employer or the self-employment business chosen by the job seeker. Job negotiation uses job development or restructuring strategies that result in responsibilities being customized and individually negotiated to fit the requirements of the job. Please see Appendix 6 of this Guide for more information on customized employment.

A key component of the proposal submitted by VCU and ICI was the identification of successful CRPs in the United States who would provide technical assistance to other providers. This network of exemplary programs was identified using a "snowball" strategy in which programs were nominated for consideration by nationally known consultants to VCU and ICI. VCU and ICI then selected 10 CRPs based on these recommendations and their exemplary track records of facilitating customized employment outcomes. These mentor organizations demonstrated expertise in implementing customized employment and in facilitating organizational change with a goal of expanding customized employment opportunities. Named the Community Rehabilitation Program (CRP) Leadership Network, these leaders or "mentors" were used extensively throughout the five years of the project to provide training and technical assistance.

More specifically, the 10 CRPs were known for converting their programs from using a certificate under Section 14(c) of the Fair Labor Standards Act (FLSA). Or, the CRPs had made substantial progress in reducing the number of individuals paid a special minimum wage who were served by their agencies. As clarification, Section 14(c) of the FLSA authorizes employers, after receiving a certificate from the Department of Labor's Wage and Hour Division, to pay special minimum wages, less than the Federal minimum wage, to workers who have disabilities for the work being performed.[1] The T-TAP CRP mentors and their agencies were as follows.

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[1]Fact Sheet #39: The Employment of Workers with Disabilities at Special Minimum Wages obtained from [http://www.dol.gov/esa/regs/compliance/whd/whdfs39.htm].

T-TAP CRP Leadership Mentors and Agencies

Nancy Brooks-Lane -- Cobb-Doublas Counties Community Service Boards in Smyna, GA
Beth Durkee -- Allegan County Community Mental Health in Allegan, MI
Lance Elwood -- Career Support Systems, Inc. in Richmond, VA
Suzanne Hutcheson -- HPS, Helping People Succeed, Inc. in Stuart, FL
Don Lavin -- Rise, Inc. in Spring Lake, MN
John Luna -- Career Design and Development Services in Dallas, TX
Jim Meehan -- KFI in Millinocket, ME
Bob Niemiec -- Community Involvement Programs in Minneapolis, MN
Corey Smith -- Via of Lehigh Valley in Bethlehem, PA
Peggy Terhune -- The Arc of Stanly County, Inc. in Albermarle, NC

This Mentor Guide was developed based on the experiences of the T-TAP mentors and project staff as they provided technical assistance and training to providers that applied for and were awarded assistance from T-TAP. A total of 15 CRPs received intensive support. One provider withdrew from the program since it was not in a position to promote organizational change.

CRPs were selected through a national call for proposals process. Each selected CRP received a detailed organizational assessment, consultation, and training over a two-year period. Each organization was matched to a mentor from the CRP Leadership Network, based on the organizational assessment and their expressed technical assistance needs. The 14 organizations that were awarded technical assistance and received support from the CRP mentors were as follows:

Mentees Organizations Receiving Technical Assistance

- AtWork! -- Issaquah, WA
- Babcock Center -- Columbia, SC
- Charles River Industries -- Needham, MA
- Cranston ARC -- Cranston, RI
- Coastal Center for Developmental Services (CCDS), Inc. -- Savannah, GA
- EmployAbility, Inc. -- Bartlesville, OK
- Friendship, Inc. -- Fargo, ND
- Hi-Hope Service Center -- Lawrenceville, GA
- Home of Hope, Inc. -- Vinita, OK
- Humboldt Community Access & Resource Center (HCAR) -- Eureka, CA
- Leslie and Rosalie Anixter Center Chicago, IL
- Magic Valley Rehabilitation Services (MVRS) -- Twin Falls, ID
- The Arc of DC -- Washington, DC
- The Arc Northern Chesapeake Aberdeen, MD

A detailed description of mentorship as a key technical assistance strategy is included in this Guide. The purpose is to provide information to CRPs on how to approach organizational change designed to improve employment outcomes, and in particular ways that a mentor may support the change. The Guide is organized around five key areas:

1. Mentorship as an Approach to Supporting Organizational Change
2. Lessons Learned on Organizational Change
3. Supporting Organizational Restructuring
4. Elements of Employment Services Change
5. Lessons Learned in Building Effective Mentor Relationships

Each topical discussion includes numerous examples of reflections by both the mentors who provided the technical assistance and from representatives of the mentee organizations. In the Appendices are numerous examples of strategies used to address potential issues faced during the organizational change process and in providing employment services. A variety of technical assistance resources and tools utilized by the mentors and T-TAP project staff members are also included as Appendices.

Terminology

This manual uses the term, **customized employment**, to refer to a process for individualizing the employment relationship between a job seeker or an employee and an employer in ways that meet the needs of both. It is based on building a match between the unique strengths, needs, and interests of the job candidate with a disability, and the identified business needs of the employer or the self-employment business chosen by the candidate. Implicit in this definition of customized employment is a focus on individual job opportunities, developed one person at a time. The terms *integrated employment* or *integrated jobs* may also be used to more broadly describe an individual job that is part of the general labor market where individuals are paid at least minimum wage, on a payroll of a community business or self employed, and are fully integrated with coworkers and customers who do not have disabilities.

Section 2

Mentorship as an Approach to Supporting Organizational Change

Introduction

Mentorship is a widely accepted practice for professional development in both the public and private sectors. Mentors serve the role of helping individuals, organizations, and/or communities set a course leading to their desired goals. The T-TAP project utilized a mentorship model as a component of the overall technical assistance (TA) to recipient agencies. TA recipients were paired with mentor agencies to help them increase the numbers of customized employment outcomes for people who had previously been paid under a 14(c) Special Wage Certificate. The T-TAP CRP Leadership Network consisted of a lead staff person within an organization that had demonstrated expertise in implementing customized employment and in facilitating organizational change with a goal of expanding customized employment opportunities. During the two-year phase of TA, T-TAP staff, the mentor site, and the TA recipient agency worked together to achieve goals set by each TA recipient for organizational change.

Definition of a Mentor

"Mentor: a trusted friend, counselor or teacher, usually a more experienced person."[2] In general, mentors provide personal support to assist an individual or organization in achieving specific goals. To be effective, a mentorship relationship requires a commitment of time and energy from the mentor and the agency / individuals receiving support. Some of the following characteristics usually are part of a mentor relationship.

The relationship…[3]

- Is deliberate, conscious, and voluntary.
- May or may not have a specific time limit.
- Is sanctioned and supported by the organization / agency by release time and the support of supervisors and administrators.
- Is in alignment with the mission or vision of the organization receiving the support.
- Occurs between an experienced person (the mentor) and one or more partners.
- Develops between members of the receiving agency and the mentor external to the organization.
- Is not one of a direct, hierarchical or supervisory chain-of-command.
- Is expected to benefit all parties for growth, career development, lifestyle enhancement, goal achievement, and other areas mutually designated by the mentor and partner(s)
- Benefits the organization within which the mentoring takes place, and

[2] From Wikipedia, the free encyclopedia, http://en.wikipedia.org/wiki/Mentor
[3] Adapted from: http://www.mentors.ca/mentorprograms.html#CEOPEER

activities occur on a one-to-one, small group, or by electronic or telecommunication means.
- Focuses on interpersonal support, guidance, mutual exchange, sharing of wisdom, coaching, and role modeling.

The T-TAP Mentors

Members of the T-TAP CRP Leadership Network represented community rehabilitation programs that had implemented a substantial organizational change process, which resulted in expanded integrated employment outcomes for individuals with significant disabilities. The T-TAP mentors were selected, because they represented a broad range of experience and expertise. They also had a willingness to share their experiences and lessons learned with others. Each mentor organization had a lead staff person assigned to the role of mentor, but in most cases, more than one person from the mentor agency became involved in working with the TA recipient.

While one mentor agency was assigned to a TA recipient, in many instances, the members of the T-TAP Leadership Network consulted together on specific issues/questions as they arose. A project listserv facilitated this communication as well as telephone conversations, which made optimal use of the broad range of mentors available. Also, T-TAP staff would facilitate the expertise of the various mentors as issues surfaced. One such example occurred early in the project when the question of unions came from one of the recipients. How does one begin any change process in a union work environment? One of the mentor agencies had, in fact, worked through that exact issue and provided guidance to working effectively with unions.

Mentor agencies were varied in nature. Some were small, employment-focused programs. Others provided more comprehensive services including residential programs and other supports. Some were rural, while others were in more urban, culturally diverse communities. Some worked with one predominant funding source / stream, while others had a broad range of funders. The expertise of these agencies varied, but a comprehensive list of needed skills and experience was developed in order to target TA questions, as well as to guide the mentor match. Some areas of expertise are listed below:

- Job Development and Marketing Strategies
- Job Creation & Carving
- Self-Employment
- Micro-Enterprise
- Managing Organization Change
- Developing & Communicating a Vision
- Professional Development & Staff training
- Funding: Blending & Braiding funding
- Benefits Planning, PASS Plans & IRWE Utilization
- Rural Employment
- Collaborating with Other Agencies
- Building Buy-in
- Disability Specific Expertise
- Board of Directors Development
- Fund-raising & Development Initiatives

Initiating Technical Assistance: Getting to Know the Organization

T-TAP staff and mentors invested substantial time at the beginning of a consultation process in learning about the organization that had requested assistance. During the initial assessment phase, two T-TAP staff spent two-to-three days at the TA recipient meeting with the full range of stakeholders. This included program administration, staff, consumers, family members, funders, and board members, while also visiting job sites with the employment staff.

In addition, a staff survey provided information on staff perceptions of organizational goals and processes. All employment staff and the agency receiving technical assistance completed a one-week log that provided a snapshot of how staff spent their time across eight major activity areas. The Staff Time Log is included in Appendix #3. This detailed initial assessment of the organization allowed T-TAP staff and mentors to develop a comprehensive knowledge of the recipient and to provide summary observations and recommendations. The initial assessment also guided the development of a technical assistance plan. During this phase, the TA recipients were paired with a mentor agency based on the site's goals, characteristics, and interests. This pairing took into consideration both the needs of the agency and the expertise of the mentor.

Incorporating Mentors

While the T-TAP staff could provide comprehensive support and assistance to recipients, there were perceived limits to that support role. Agencies seeking TA services must balance the management of their ongoing services with the time needed to examine their practices and explore opportunities for improvements in their service model and professional development of their staff. While sensitive to the difficulty of this situation, T-TAP staff members were employed at universities. They could be perceived as "not living in our day-to-day world" by the organizations receiving technical assistance.

The value of the mentor in this situation was to serve as a peer who currently provided and managed customized employment services. This peer had also been though the same sorts of issues being experienced by the TA recipient and had survived. The mentor served as the "light at the end of the tunnel" and provided encouragement, hope, vision and guidance to the agency. This mentor also discussed current approaches and strategies employed in serving a broad range of people with disabilities. Finally, TA recipients desperately wanted to hear success stories and how they were achieved. They also wanted to benefit from the lessons learned about strategies tried and rejected.

Roles and Responsibilities of the Mentor Agency

The role of the mentor was to provide technical and personal support to the agency. This mentor process could include anything from providing training to the agency; facilitating meetings with job seekers, family members, employers, and/or others; modeling techniques such as person-centered career planning meetings or job development approaches; attending meetings; sharing tools and resources; and participating in phone calls. Typical mentor activities included:

- Conducting an initial site visit to see the agency and employment sites to meet job seekers, staff, family members, and board members, with a planned follow-up visit the following year.
- Arranging for staff from the TA recipient to visit the mentor agency, tour the organization, see employment sites, and talk to key staff and other stakeholders.
- Assisting with the development and implementation of the TA plan.
- Participating in meetings with employers to explain customized employment.
- Participating in brain storming or case consultation meetings regarding individual placements.
- Working with job development staff to develop their skills with job seekers, employers and other stakeholders.
- Encouraging any and all networking strategies possible that can help with job development.
- Exploring the possibilities of using job seeker social capital in the job search process.
- Working with employment services supervisors and managers on approaches to improve program outcomes.
- Working with agency leadership, including Boards of Directors, to think about ways in which to get their agency to produce good community employment outcomes.
- Encouraging an agency-wide commitment to assisting with outreach strategies leading to more employment (not just the job developers' job).
- Sharing strategies employed for communication about customized employment within the agency as well as with all stakeholders in the process.
- Sharing ideas and strategies for funding including creative blending and braiding of resources.
- Helping the agency connect with any useful resources or contacts that could be beneficial.
- Helping the organization think through strategies to overcome barriers encountered.
- Sharing training materials and resources, articles, strategies, tools, forms, and ideas to help with customized employment outcomes.
- Participating in meetings with funders to share successful models utilized in other states and regions.
- Providing staff training.
- Participating in regular conference calls with the recipient to monitor progress and provide brainstorming assistance.

Benefits of Mentorship

T-TAP mentors made it clear that participating in a mentorship relationship also had benefits for the mentor. These benefits included developing new perspectives on strategies and change in their own organizations. It created an opportunity for personal development and for renewing passion about work. Although the primary mentor contact was a senior administrator, most of the mentor organizations involved multiple staff in the mentorship process. Included were program managers and direct support staff. Peggy Terhune, the T-TAP mentor from The Arc of Stanly County, talked about the benefits of being a mentor. She noted the following:

> "With one of our mentee agencies, there was an interest and focus on micro-enterprise. I had heard that the mentee agency had consulted with some of the experts in our agency. I was not sure what we could offer [the TA recipient]. However, once we [the mentor agency and the TA recipient] started talking about individuals, we found many ways to assist each other in brainstorming for the people that both agencies supported. I found that the mentee agency hadn't yet done enough micro-enterprise to have negative experiences and was able to assist them with some of the potential pitfalls.

In addition, because they [the TA recipient] were inexperienced, I found their ideas refreshing. They were trying things that we might not have tried, since we [the mentor agency] recognized the issues that could arise. The mentee agency "innocently" plowed ahead and had wonderful success. For my agency and me, that experience was a great "re-motivator", as people in my agency were tired and frustrated by some recent barriers. I was able to take some of my key staff to the mentee agency to provide training and support. They came back energized, motivated, and with new ideas. They also came back gratified that they had been able to provide so much information and instruction that was new to the mentee agency. Altogether, it was a great reciprocal learning relationship!"

Similarly, Nancy Brooks-Lane, another T-TAP mentor, emphasized the importance of opportunities to learn from others. "That is the beauty of being provided the opportunity to spend intense time with others as a mentor. We were able to spend time with the interesting personalities [with] differing worldviews and perspectives. [We saw] the creativity of the staff and aspects of the mentee organization that were working and that would fit with our organization and make us better at our mission."

Mentee Roles

In order for a mentoring relationship to be fruitful, there is a need for a level of commitment from the mentee organization as well. Participating organizations were expected to be actively engaged in the TA process and to maintain a clear commitment to facilitating change and reallocating resources. Involvement in the TA process and mentorship also included a commitment of resources including staff time. The mentee needs to:

- Maintain active contact with the mentor and TA staff.
- Participate in site visits from mentor as well as TA staff.
- Arrange for a site visit to the mentor agency.
- Work with mentor and TA staff on the development of a TA plan with action steps, timelines, staff assignments, and follow-up.
- Allocate staffing and other resources as outlined in the plan.
- Identify job seekers for customized employment.
- Participate in training made available through mentor, TA staff, or other sources to support the customized employment outcome goals.
- Facilitate the completion of all data-collection recommended through the TA.
- Examine current policies and procedures as recommended through TA for efficiency.
- Commit adequate staffing resources including any needed resource reallocation as determined through the TA.
- Facilitate communication with all stakeholders (job seekers, family members, funding agencies, employers) in reference to customized employment initiatives.
- Participate in any necessary meetings with policy makers on the use of the 14(c) certificate.
- Participate in regular conference calls for updates on the activities of the project.
- Explore agency needs and request specific help and guidance from mentor and TA staff as needed.

Through the course of the two-year relationship with TA recipient agencies, the role of the mentor evolved. Initially, they were seen as an external source of support to augment technical assistance provided by T-TAP staff. However, early on in the project it became clear that the mentors needed to be woven into all communication with sites as a part of the comprehensive TA to the agency. This involvement kept a comprehensive communication intact and allowed both the mentor and TA staff to support each other's work.

Lessons Learned About Being an Effective Mentor

The following sections in this Guide provide detail on the specific technical assistance roles that the T-TAP mentors played in supporting both the organizational change process within mentee agencies and in how these agencies approached employment services. The mentors learned a number of valuable lessons in being an effective mentor through these experiences. Some of these included the following:

Lessons Learned about Being an Effective Mentor

- Establishing a relationship takes time.
- Communication is critical.
- Develop a statement of need.
- Keep interactions action oriented.
- Be willing to show your imperfections.
- Get to know the organization's approach with its customers.

Establishing a relationship takes time. It takes effort to build a mentoring relationship. While the mentor can be viewed as having a great deal to offer, relationship building is essential in order for mentoring to work. This process takes time and effort. Time spent in person as well as in dialogue on the phone or via email can be included in the process. Site visits to both the mentor and mentee agencies create an opportunity to become more familiar with each other's staff, facilities, approaches,

values, and realities. These site visits make the connection more personal. It is very important that these visits occur early in the mentoring process.

Communication is critical. Mentors emphasized staying in regular and consistent contact with their mentees. The mentor and mentee should have regularly scheduled times to talk. Other critical communication may happen in between the regularly scheduled contact. Most often in T-TAP, this contact was made by phone, and it happened monthly. Additional quick questions were handled via email or brief phone conversations, but the monthly call was more comprehensive in nature. These calls allowed for follow-up on, for example, client status, organization issues, and funding changes. One important note is that when each conversation ends, there should be an agreed upon time scheduled for the next connections.

Develop a statement of need. The mentee agency must be given an opportunity to state their goals or needs in order for them to feel the relationship serves a beneficial function. In T-TAP, this was incorporated into the TA plan. There should also be opportunities to revisit the stated need to determine the progress being made or for changes to be made in the TA priorities.

Keep interactions action oriented. Do not get stuck in planning and waiting for everything to be just right or for all questions to be answered before organizational change begins. Take action and use what is learned to plan the next step in the process.

Be willing to show your imperfections. The mentor must be straightforward about his or her own organization's imperfections. This allows the mentor to be seen as a peer by the mentee, not as the "expert" coming in to tell the mentee what the mentee organization is doing wrong.

Get to know the organization's approach with its customers. One mentor emphasized the importance of getting a chance to shadow the job developers doing their job in the field and observing their approach and interaction with employers.

Summary

Mentors can support the challenges of organizational change in many ways. They are the experienced peers who have managed to successfully navigate through the organizational change process in their own community rehabilitation programs. The mentor can identify directly with the inevitable issues and barriers that the mentee organization undergoing change will experience, and can help strategize in developing effective responses. Mentors are a source of information and a source of personal support, providing encouragement, hope, vision and guidance. At the employment service level, mentors can draw on personal experiences with strategies employed in serving a broad range of people with disabilities, including customized employment. Mentors are both a resource as an individual and a bridge to the multiple resources available within their own community rehabilitation programs.

Section 3

Lessons Learned about Organizational Change

"People told us their priorities were getting married, having their own home, and getting a job. We had to ask our 250 staff how many people are wholly focused on helping people:

- *Develop significant relationships,*
- *Find a job, and*
- *Become homeowners?"*

Peggy Terhune, T-TAP Mentor
from the Arc of Stanly County

Over its five-year funding period, T-TAP worked intensively with 14 community rehabilitation providers and 10 mentor organizations. It interacted with countless other stakeholders who are committed to expanding opportunities for customized employment. At the core of the many lessons learned during the project is the simple message stated above by Peggy Terhune and taken from the people who utilize employment services. People with disabilities utilizing community programs are interested in relationships, work, and where they live in the community.

CRPs need to be clear and uncompromising that the purpose of their work is to create an organization and a system guided by strong expectations that work is right and possible. Programs need to celebrate the interests and gifts of each individual served by supporting employment outcomes that improve quality of life at an individual level. Consider the following true story told recently by the brother of a man who has Down's Syndrome and who is about to turn 60.

"My brother never received supports as an adult from the state or federal human service systems. He is a city employee who holds a job as an assistant custodian, lives in his own apartment, and has both a pension and a retirement account. He started his education in Catholic school because that's what his three brothers did. He moved to the public schools so that he could receive special education services, and then went to work because that was what was expected of his brothers. At every point in his life, the family assumed that he should work and never questioned whether he could work."

Effective community organizations must develop a parallel strong expectation that work is right and possible for each individual supported by the CRP. They should celebrate individual interests and gifts in creating employment opportunities. These organizations can measure the effectiveness of their employment services by asking questions such as:

- How many hours per week are invested directly in looking for jobs?
- What are our relationships with the employer community?
- What do we measure and celebrate when considering the outcomes of our work?

Organizations receiving technical assistance through T-TAP that were successful in implementing change and expanding employment opportunities took a holistic approach incorporating strategies in six areas. Listed in the following Table, these six areas provide a framework for assessing an organization and planning for change. As previously noted, this process begins with understanding how an organization sets and manages goals. Expectations refers to the success of an organization in communicating expectations and priorities to stakeholders at all levels, including customers, staff, funders, and the community at large.

Lessons for Organizational Change

- Lesson 1: Establish clear and uncompromising goals.
- Lesson 2: Communicate expectations to everyone, often.
- Lesson 3: Reallocate and restructure resources.
- Lesson 4: Just do it! Find jobs one person at a time!
- Lesson 5: Develop partnerships.
- Lesson 6: Consider the whole person.

As Peggy Terhune suggests in the opening to this Section, implementing change requires investing resources directly in activities that support the priorities set by the individuals receiving services. Partnerships can be with individual customers, with the network of stakeholders that support them, with funders, and with the business community. Finding jobs requires that community programs just do it. Too often, too many resources are invested in planning for change. Organizations neglect the most basic opportunity of investing intensively in the process of finding jobs and learning what needs to be done more effectively through this hands-on experience. Finally, the experiences of T-TAP suggest the importance of considering the whole person by planning for the interaction of work with other elements of an individual's life, including sustaining and building friendships and financial planning. This can be illustrated by the following figure.

Lesson 1: Establish clear and uncompromising goals.

> *"You have to know where you're going, to be able to state it clearly and concisely – and you have to care about it passionately."*
>
> Tom Peters and Nancy Austin

Organizations that are most successful establish a clear commitment to community employment. Several organizations in the T-TAP project defined explicit and public goals related to integrated employment. The Arc of the Northern Chesapeake Region (ArcNCR) in Maryland developed a goal of "full employment by July 1, 2006." In addition to establishing a clear goal, ArcNCR's approach provided a clear definition of what they mean by employment. In defining this goal, ArcNCR specified that full employment would be achieved when 100% of the individuals served by the organization in Vocational Services:

- Work in "integrated" settings. (Defined as Non-ArcNCR owned or operated facilities where people with no employment relationship to the ArcNCR are present at least some of the work time of individuals served.)
- Are compensated financially for work performed.
- Work at least 80% of the number of days and/or hours documented in their Individual Plans.
- Receive ongoing Career Planning and Development supports that expand opportunities for professional growth (increased skills, wages, hours or days of work, satisfaction with work and/or exposure to alternative work options and opportunities).
- Have a contingency plan for layoffs and terminations from employment that include immediate job search plans and alternative activities and supports.

Another example of establishing clear goals is illustrated as follows. During the initial organizational assessment in developing the T-TAP TA plan, the Executive Director of Coastal Center for Developmental Services (CCDS) in Georgia identified a specific organizational goal that became a sounding board over the following year. This goal, "60 jobs in 2006", established such a strong challenge to the organization that everyone had to approach their jobs differently. CCDS supported approximately 350 individuals annually, and at the time of the challenge supported about 50 individuals in community employment with a staff of three. Over the next year, CCDS restructured resources, established a wide range of outreach and communication paths, invested heavily in finding jobs, and developed new partnerships. These actions will be discussed in more detail in later Sections, but the power of the goal was clear that there could not be "business as usual" at CCDS. Jim Collins, author of From Good to Great, refers to this type of goal as a BHAG, a Big Hairy Audacious Goal[4]. BHAGs have the power to support organizational transformation, as illustrated by John F, Kennedy's goal to put "A man on the moon by the end of the decade." Collins suggests that an effective BHAG is:

- Set with understanding, not bravado.
- Has a long time frame.
- Is clear, compelling and easy to grasp.
- Reflects directly core values and core purpose.

Lesson 2: Communicate expectations to everyone, often.

Expectations can be communicated to an organization's stakeholders in a variety of ways including policy initiatives, outreach activities such as newsletters or meetings, and celebrations. Too often a goal is buried in an organization's strategic plan and is not well understood as part of day-to-day organizational practice. ARC Industries in Oklahoma communicated its change in focus by changing its name to EmployAbility, Inc. The process of developing and implementing the new name was used to educate board members and the community at large about the organization's goals and purpose.

[4] Do you have a good BHAG or a bad BHAG? Retrieved from: http://www.jimcollins.com/index.html

Commitment. Organizational intent is communicated, in part, by the decisions made each day. Magic Valley Rehabilitation Services (MVRS) in Idaho implemented an enhanced commitment to integrated employment. This TA recipient strongly urged all new referrals to the workshop program from Vocational Rehabilitation to consider community employment first during the intake process. Friendship, Inc. in North Dakota, another TA recipient, clearly communicated priorities to staff by declining a new large workshop contract and instead negotiating with the business for individual job opportunities. Hi-Hope Services in Georgia, a TA Recipient, shifted responsibility for managing and staffing an enclave to the workshop staff. This made the expectations for community employment staff on individual job placements clearer, and their time more focused.

Outreach. CCDS, a TA recipient in GA, is using newsletters, initial intake meetings, annual reviews, and family meetings to gradually shift attitudes toward employment opportunities by highlighting successes and maintaining visibility of employment options. CCDS implemented a monthly newsletter that highlights and celebrates new jobs and employment success stories. Regular parent meetings with families have been used to discuss employment options, and community employment is now emphasized as a first option as part of the intake process for new referrals.

Celebration. CCDS also visibly celebrates new jobs by posting large banners outside of the door of the workshop for each new job. This visible statement of CCDS priorities helps raise awareness of job opportunities, and stimulates conversation with individuals still in the workshop. Other mentee and mentor sites use similar strategies. EmployAbility, Inc. in Oklahoma maintains a "hall of fame" in its lobby, with photographs of individuals at their new jobs. KFI, Inc. in Maine, a T-TAP mentor organization, maintains a tradition known as "the doorbell still rings", serving as a symbolic memory of their old workshop that was closed some years ago. When someone gets a job, somebody rings the KFI doorbell, and everyone flocks out to celebrate with the new employee.

Lesson 3: Reallocate and restructure resources.

Allocating dedicated resources to community employment is a central part of the change process. Successful organizations have redefined job positions and expectations to clearly focus on employment outcomes. They have insulated these positions from other responsibilities.

One of the early steps in conducting an organizational assessment with organizations receiving TA was to conduct a one week study of staff time allocation across nine major activity areas including on-the-job support, off-job support, and job development. How organizations invest their resources is a direct reflection of their priorities, and it has a significant influence on outcome. Typically, T-TAP TA staff found that at initial assessment, organizations were investing less than 2% of staff time in job development, often in contrast to high expectations for new job placements. While it is clear that the quality of job development activities matters, it is also accurate to say that quantity matters. A first step in implementing a stronger approach to employment support involves a willingness to reallocate resources, even if it creates a temporary hardship in other areas. Discretionary funds can be used on a temporary basis to support staff emphasis on achieving employment outcomes.

Humboldt Community Access and Resources (HCAR) in California recognized that while there were staff resources dedicated to job development and job support, there was a need to rethink the roles of these staff. The process of job placement was spread across four different individuals representing intake, vocational evaluation, job development, and job support. Information and time was lost in the handoff between individuals in each of these roles. HCAR streamlined the process by involving the job developer directly in intake and eliminating the vocational evaluation position. Charles River Arc in Massachusetts recognized the need to reframe its job placement staff positions as exempt positions that had flexible hours.

As part of responding to the challenging goal ("60 in 2006"), CCDS gradually shifted and restructured staff positions over a 12-month period. The earliest change was assignment of a workshop staff member to the community employment team. Later as the number of job placements grew, CCDS eliminated the position of case manager in the organization and reassigned two of those staff to work in community employment.

Achieving clear job expectations was more difficult for several organizations that maintained multiple service options. In one organization, start-up of the T-TAP project was slowed by an emphasis on hiring new staff rather than reallocating existing resources. Other organizations struggled when job placement staff were responsible for serving both external referrals typically funded by the State Vocational Rehabilitation (VR) Agency and individuals in the organization's workshop who wanted external employment. The demands of the VR system to achieve rapid employment often made it difficult to focus sufficient time on individuals who would need to receive long term supports.

Lesson 4: Just do it! Find jobs one person at a time!

> *"Do not get stuck in planning and waiting for everything to be just right or all questions to be answered before the system change begins. Take action! What is learned can then be used to plan the next step in the process.*
>
> *Nancy Brooks-Lane,*
> *Cobb and Douglas Counties CSBs*

In addition to allocating additional resources to job development, sites that have been successful are aggressive about implementing career planning and job placement. Career planning is a critical foundation for later job development. In sites that did not develop a strong job placement capacity, site personnel were not able to answer core questions about a job seeker's interests and priorities, even when job development was active for that person.

At a recent site visit to a community rehabilitation provider, staff discussed an unsuccessful placement with a mentor. The individual had been placed in a retail setting doing stock work and retrieving and moving shopping carts. This was despite the fact that his individual service plan clearly stated that he should not lift over 20 pounds. Having a clear, simple, and well-understood set of job specifications and preferences for each job seeker needs to be a high priority. Sites that have been successful in expanding integrated employment have four characteristics that define a "just do it" approach.

Characteristics of a "Just Do It" Approach

- Urgency In Career Planning And Job Development
- Outreach To Families
- Networking
- 30-Day Placement Plan

Urgency in Career Planning and Job Development. Within the first several weeks after an individual has been prioritized for job placement, a well-defined, comprehensive strategy for career planning should be completed. The end product of this process is a clearly defined criteria or standards for a good job match that reflects the individual's interests, preferences, and needs. Cranston Arc is a good example of a TA recipient that developed a career planning process, which provides a comprehensive "picture" of the person. This included getting to know an individual's learning style, access or accommodations needs, and fears and concerns about leaving the workshop for a job in the community. Staff worked with the individual, family, friends, and community members to develop the plan. Staff also provided opportunities for people to experience work through volunteer placements, job shadowing and mentoring experiences. For example, Cranston Arc staff assisted Susan in the career planning process. Susan and her family expressed a preference for not working with the general public and for consistent transportation as important in her job match. Susan selected working in a small retail setting with consistent and familiar coworkers as her job preference.

Friendship Industries, Inc. in North Dakota incorporated a "just do it" approach by targeting some very challenging individuals for community employment. The organization had a "whatever it takes" approach and put together interesting arrangements and entrepreneurial efforts on behalf of the people that they supported. For example, an individual had a job in one community and was then transported to another for the remainder of the day. Instead of just transporting this person, Friendship Industries negotiated a second job as deliverer for the individual. They stop at a bakery, and the person picks up bakery products. These are delivered to the other community resulting in a customized job for this individual.

Outreach to Families. Magic Valley Rehabilitation Services (MVRS) in Idaho worked very closely with a family that had specific criteria for acceptable work for their daughter. In addition to health and safety concerns, they had a strong desire for their daughter to have a position that they could view as having value. Initial conversations with the family were sometimes tense, but MVRS staff recognized that success required strong family support. Eventually MVRS found a position for the woman at a restaurant in a job that appeared to meet everyone's requirements. She enjoys the work even though there was concern initially that she would miss her friends at the workshop. This did not happen. The family accepted the work place and work conditions. The other employees welcomed the new employee, and the manager of the restaurant was eager to make this a positive experience.

This example demonstrates the importance of outreach to family and other members of the individual's network. Outreach to family ensures that the career plan and job placement process incorporates all resources in defining the career plan. In addition, the plan must identify concerns and barriers in order to make successful connections with the business community.

Networking. Successful organizations are assertive about networking for job leads and supports. One job seeker at Charles River Arc had an interest in working with animals. The job developer began with the usual methods of looking for a job--reviewing help wanted ads, networking with family and friends, and using internet job postings. After several months of searching without success, the job developer helped the individual set up an informational interview at a local animal shelter. The interview led to a tour, which led to a job interview. The next week the job seeker was hired as an assistant at the shelter and was able to fulfill her dream of working with animals. After this experience, the job developer realized how powerful informational interviews and tours were as customized employment strategies that support job negotiations. The agency job developers now incorporate these tools into their job development practices on a regular basis.

Thirty-Day Placement Plan. The 30-Day Placement Plan is a month-long plan geared towards finding a job. The plan includes tasks to be accomplished that month as well as due dates and names of people who are responsible for completing each task. Many job seekers have found that breaking the job search down into a series of small, workable tasks makes the process much more manageable. A plan also gives the job seeker a sense of empowerment over the direction of the job search and a sense of accomplishment when each task is completed.

Every 30 days, the plan is updated with new tasks for the upcoming month. The job seeker, the employment specialist, and anyone in the individual's support network (e.g., family, friends, and other professionals) should be involved in writing and implementing the plan. Central to the use of the 30-day placement plan is ensuring that job development is a rapid process that proceeds systematically and is focused on the individual's career goals.

Lesson 5: Develop partnerships.

Internally, supporting change requires engaging key stakeholders, including board members, in the change process. In organizations where the board was fully engaged in setting goals and reviewing policy related to service delivery, a change in leadership did not have a significant impact on the organization's commitment to expanding customized employment. For example, at CCDS, the retirement of the executive director had minimal impact on the commitment to integrated employment. In fact, CCDS asked Don Lavin, the mentor assigned to the site, to visit at the time of the changeover and meet with the incoming director.

Building community partnerships. Successful organizations also developed external partnerships that support employment outcomes. Community partnerships can develop across a variety of situations, such as creation of a local business network that promotes access to jobs for people with disabilities, or an agency partnership focused on meeting individualized support needs of a consumer. For more information on building community partnerships see the T-TAP fact sheet, Developing Collaborative Community Partnerships in the Appendix 6. The common thread running through each of the following examples is a clear focus on achieving customized employment outcomes.

Staff from Cobb and Douglas Counties Community Services Boards (CSB) in Georgia, a mentor agency, created connections to the business and social networks in a small community served by the CSB by forming a collaborative partnership among 12 small business owners. This partnership put into place a network of businesses. The employment support staff could use this network in determining who would be key to helping people with disabilities find employment based on each individual's vocational profile and stated work goals. The network has worked extremely well. Now, participants call on one another as needed regarding employment opportunities available through member businesses. CSB staff contact the business owners to identify potential job leads.

In order to address family and individual concerns about the interaction of work and benefits, EmployAbility established an arrangement with their local Benefits Planning, Assistance, and Outreach (BPAO) office, now the Work Incentives Planning and Assistance (WIPA) Program. A counselor from the BPAO office came to EmployAbility monthly and more often if needed to discuss and counsel job seekers on their situations. In most cases, this counseling by the BPAO staff member helped the job seeker understand the benefit situation. This support allowed the individual to move one and to search for and ultimately secure employment with the assistance of EmployAbility.

What are the elements of an effective community partnership? Effective collaborative partnerships promote actions that improve personal outcomes for those receiving services and foster positive change in the systems influencing these services. The Institute for Community Inclusion, University of Massachusetts Boston completed a research study on interagency partnerships[5]. This study identified a series of quality indicators for effective strategies in forming effective interagency partnerships. For each of these quality indicators, there are a series of self-evaluation questions a partnership can use to identify its areas of strength and needed improvement. The questions focus on determining the extent to which each indicator is fully or partially in-place. For those indicators not fully in-place, follow-up actions can be identified and initiated. This self-evaluation can be used as a planning tool during the development of partnerships and for periodic reviews in monitoring the partnership's role and effectiveness.

[5] Butterworth, J., Foley, S., & Metzel, D. (2001). Developing interagency agreements: Four questions to consider. The Institute Brief, 11(1). Boston: Institute for Community Inclusion, University of Massachusetts Boston. Available at http://222.communityinclusion.org/article.php?article_id-14&staff_id=2

These five quality indicators can be extremely useful both in forming a partnership and in monitoring and continually improving an existing partnership. Conscientious use of these indicators helps keep a partnership goal and action oriented. Here are examples of self-evaluation review criteria for each of the indicators.

Examples of Self-Evaluation Review Criteria

Indicator 1	The partnership has a clearly defined purpose. Purpose is operationally defined by having clearly identified outcomes. A data collection system is in place to measure the intended outcomes. The outcome measures emphasize quality of services and outcomes.
Indicator 2	Allies to the partnership are identified and involved with the collaborative effort. Allies to a partnership are both internal and external. Internal allies within the partnership must be identified. These internal allies are the stakeholders involved in the planning and implementation of the partnership. Support is also needed from external allies who help to ensure political support for the partnership. Allies to the partnership have a common interest in its purpose and a commitment to its success. Successful partnerships frequently have champions among their external allies who serve as key sponsors and advocates.
Indicator 3	The collaborators are committed to the partnership and exercise ownership in carrying out its activities. Ownership comes in part from identifying an individual from each partnering agency or program who is responsible for the implementation and success of the partnership. Inconsistent and/or rotating participation from partnering agencies will destroy the development of any real sense of ownership.
Indicator 4	The partnership leads to actions and outcomes consistent with the defined purpose. Specific action plans are in place where tasks are well defined drives action-oriented partnerships. Action-oriented partnerships also have needed resources committed. These resources are both the time of the partners, particularly among the designated representatives, and in-kind or monetary support.
Indicator 5	Mechanisms are in place to communicate values and resolve differences. Effective partnerships have organizational values that are identified and incorporated into action plans focused on meeting the interests and support needs of consumers. For example, an organizational value for a partnership focused on employment outcomes for individuals with significant disabilities could be a zero-reject approach to the consumer population, meaning that any person who expresses any interest in employment is given an opportunity. Effective partnerships also have mechanisms in place to resolve disagreements.

Lesson 6: Consider the whole person.

One significant concern in supporting customized jobs is ensuring that the components of an individual's life work together well. Strategies for ensuring this integration include the use of a career planning process that involves multiple stakeholders. These stakeholders assist in defining a vision for employment with the individual and involving others in the action steps of finding and supporting a job through a 30-day placement plan. Involvement of stakeholders ensures commitment to variation in schedules, arranging for transportation, scheduling non-work appointments, and other work and non-work activities and supports. For many individuals, entering employment also requires giving up relationships and supports that may have been built up over an extended period of time. The limited independent mobility for many individuals in customized employment requires that attention be paid to supporting the maintenance of personal relationships so that an individual gains more than he or she loses when entering an integrated job.

As part of their organizational change process, CCDS developed a systematic approach to facilitating opportunities for individuals to stay connected. CCDS maintained a dual goal of both assisting individuals in finding customized jobs and in helping them maintain established relationships and participate in integrated social activities in the community. Staff began by creating a newsletter for those individuals interested in or already participating in community employment. In addition to profiles of new jobs and employers, the newsletters also covered "what's happening in the community". This section contained a list of community events for the next month, such as the Savannah Film Festival, the Coastal Empire Fair and the upcoming Community Employment Services Social.

Each month, Coastal Center's Community Employment Services staff facilitated a social event for anyone involved in community employment. The first meeting was a potluck supper held at the agency, and the agenda was to plan activities for the upcoming months. All activities since then have been in the community, with staff committed to facilitating social integration. To date, the group has gone to the movies and ice-skating. Individuals have met at the site, such as the movie theater. Staff realized that some individuals have difficulty getting to various locations and have assisted by mapping out bus routes and in extreme situations providing rides. Individuals look forward to the opportunity to see old friends and make new ones. In addition, group members have acted as a peer support to each other, helping answer questions and concerns about community employment. Lastly, the social outings have provided an opportunity for the staff to reconnect with individuals who are independent on their jobs and have faded from intensive supports to ongoing supports.

Friendship has used T-TAP's emphasis on community work to expand its organizational thinking about all its isolated services. As a consequence, Friendship has made a decision not to renew one of its building leases when it ends in the summer of 2007 and has instead looked for opportunities to be in the community. In what staff described as a holistic approach, the organization closed a seven-person group home supporting people to live in smaller more individualized settings. Also, during one week of each month, Friendship's day program provides only community supports. No activities are held within its buildings.

Summary of Lessons Learned about Organizational Change

Community rehabilitation programs that move successfully through an organizational change process focused on prioritizing support for employment outcomes do consistently demonstrate a variety of core characteristics. The lessons learned about organizational change from T-TAP clearly demonstrate a number of these key organizational characteristics. For example, establishing clear organizational change goals and expectations demonstrates that the organization is committed to change as evidenced by the visible support of the organization's leadership including its board of directors, executive officers, management team, and direct service staff. These goals are communicated through written plans of action that includes measurable benchmarks. A division of labor clearly exists among managers and staff, and progress check points guide present and future activities.

Active investment in realigning resources and establishing community partnerships that clearly support achievement of employment outcomes put into place the supports and services needed for success. Proactively investing in marketing and job development initiatives with employers from the very beginning of the organizational change process creates a dynamic learning experience for staff based on experience. This "just do it" approach creates momentum and enthusiasm as successful employment outcomes are achieved and celebrated. Finally, the core central focus is on each person utilizing the employment services of the community program and the supports the individual needs to live and work successfully in the community. The remainder of this Guide details the lesson learned through T-TAP on supporting organizational restructuring and on elements of employment services change.

Section 4

Supporting Organizational Restructuring

As indicated in Section 3 of this Guide, expanding integrated employment requires a substantial investment in resources, skills and cultural change for most organizations. Mentor organizations can support organizations in reviewing policy, strategy, resource allocation, staff development and business plans as part of the change process. This Section highlights ways that T-TAP mentors supported organizations as they reconsidered their goals and structure.

Significantly expanding integrated employment is not achieved by just adding-on integrated employment services to existing programming. Successful expansion of integrated employment within a community rehabilitation program requires a shift in organizational structure, priorities, and resource allocation. Two underlying beliefs are basic to the T-TAP mentoring process:

1. Expanding employment is as much about changing the culture of an organization, and the way it communicates with its stakeholders, as it is about developing new skills.
2. Creating change requires doing things differently from early on in the development process. Described as a "just do it" attitude, mentors and T-TAP staff encouraged organizations to focus energy on career planning and job development for individuals first, and to allow that experience to help define needed changes in policy and structure.

Building a Mentoring Relationship

Change is hard and often requires making difficult decisions. The experience of Rise, Inc., a T-TAP mentor organization, and Coastal Center for Developmental Services (CCDS), a T-TAP mentee organization, offer a number of insights into the lessons learned about successful mentor-mentee relationships. The use of mentoring as an effective organizational change strategy works best when the mentor and mentee organizations are well matched, share a consensus about their respective roles, and have clear expectations of each other. The organizations must work together from a structured plan of action with identified goals. Both must be willing to commit the necessary time and resources to building a successful relationship.

When these identified qualities are in place, mentee organizations can build upon their internal capacities to reach organizational change goals more effectively, efficiently, and with a greater degree of confidence. Rise was introduced to CCDS staff members by phone and at a project meeting held during APSE, The Network on Employment's annual conference. The two agencies maintained regular contact through monthly telephone meetings, two visits to CCDS by Rise staff over a one year period, and one visit from CCDS staff to Rise. Rise input as mentor included organizational and administrative support for issues including business marketing methods, use of funding streams, agency resource management, transportation issues, staff development training, and family education programs. Rise staff that visited included staff with more of a focus on direct job development and job support.

Organizational Approaches to Restructuring

Mentor agencies used their time to help the mentee with big-picture issues of running an agency that is providing quality employment services. Mentors consulted on a myriad of issues from building, maintaining, and managing teams; dealing with buy-in; and communication with staff, family, funding agencies, employers, and the community. Mentors were asked for suggestions around developing their boards or simply addressing the boards to help them hear about the mentor agency's experiences. Mentors were asked for input on recruitment and interviewing new staff members and how to empower family members and consumers in the process. The following examples come from the work done by mentors with mentee agencies.

Rise was particularly responsive during a change in leadership at CCDS. Rise staff arranged a visit as the new Executive Director started in order to provide continuity and background on the initiative. The Executive Director at Coastal Center retired during the T-TAP project after having set high placement and organizational goals of a significant downsizing of the workshop. The wheels were in motion and staff was charged and well on their way to achieving the goals when the Executive Director retired.

The staff from Rise played an important role in helping the newly hired Executive Director of the agency understand the spirit of the T-TAP project. While this person knew the broad range of services and projects at Coastal Center, she did not come with the knowledge of the T-TAP project, nor did she have much familiarity with customized employment. The mentor from Rise spent time with the new Executive Director to assist with the discussion about community employment, the T-TAP project, and the team's long-term goals. The mentor's actions were a tremendous support to the employment services team, who now had an advocate while they were doing the placement and support work.

The mentors from Cobb and Douglas County Community Services Boards reported that their organizational work with a number of mentee organizations focused on several areas including working on buy-in from the leadership, and on organizational values. The mentors addressed issues such as questions on promoting a philosophy of community-based supports. If an organization is moving in the direction of a priority on community-based (as compared to center-based) support, how should that organization make this move functional in day-to-day decision-making and problem solving? Mentorship also needed to involve broad participation among staff, job seekers, family members and beyond, which would need to start with communication. The mentors also helped the agencies think about planning to help staff with the development of their newly required skill sets to achieve employment.

Job Development and marketing could be brand new to staff not experienced in services focused on community integrated employment outcomes. Developing natural supports and planning for fading from the job site may not feel feasible for the inexperienced staff, and they need opportunities to learn about new approaches. The mentors encouraged management to consider the development of team structures to achieve their goals and to serve as a base for needed staff development. The mentors brainstormed with the mentee organizations approaches to developing and maintaining self-managing teams. Another important issue identified by the mentors was that the staff can make or break the efforts on organizational change and development. While staff turnover can be difficult, a good match of staff to the job is essential. In other words, some staff that just won't "buy into" the organizational change process will either leave or be asked to leave. This is not a sign of failure of the organization. In fact, it reflects more of the norm. The final piece of advice mentors from Cobb and Douglas County Community Services Boards mentors is that CRPs need to move ahead with the change process even though they may not have all the questions worked out from the start. Action steps may inform the organizational change process and start to help with finding the answers. One mentee agency described the results achieved through its mentor support for its overall organizational approach as the following:

> *""It gave new life to the agency. It was as if a fire had started and some people were looking at the program completely differently. I personally felt grateful to have that peer here for us. I could ask anything, because he became a friend and a peer."*

Support Provided by Mentors for Organizational Restructuring

Mentor support

- Reframe the roles and responsibilities of employment personnel.
- Communicate a clear commitment to community employment.
- Support policy that emphasizes integrated employment.
- Engage all stakeholders, including board members, in defining a vision and goals for employment outcomes.
- Assess and support leadership buy-in.
- Help administrative staff see alternative structures and staff roles.
- Understand what they want.
- Think outside the box.

Reframe the roles and responsibilities of employment personnel. Redefining the role of employment specialists was an issue for several sites. As TA recipients

created a greater emphasis on job development and flexible support, some organizations needed to reconsider job descriptions and redefine positions as exempt (professional) positions instead of hourly positions. Mentors provided examples of job descriptions and staff orientation materials. To illustrate how staff function, mentors had mentee staff participate in team meetings and shadow direct support staff during site visits to the mentor organization.

Communicate a clear commitment to community employment. While several mentee organizations defined explicit and public goals related to integrated employment, others needed to be challenged to establish a clear goal and expectation for customized employment. In these cases, mentors challenged leadership to be clear in communication with staff and other stakeholders. For instance, staff from Costal Carolina Developmental Services stated, "In 5 years less then 50 individuals with disabilities will be employed on site at Chatham Industries (their workshop and work crews), and 60 individuals will enter employment in 2006. " As another example, the Arc of Northern Chesapeake established and circulated to all staff a statement declaring intent to achieve "full employment" for individuals supported by the organization.

Organizations used a variety of outreach approaches to communicate a value for integrated employment. CCDS used newsletters, initial intake meetings, annual reviews, and family meetings to gradually shift attitudes toward employment opportunities by highlighting successes and maintaining visibility of employment options. ARC Industries in Oklahoma signaled its change in focus in part through a name change to EmployAbility, Inc that was used to educate board members and the community at large about the organization's goals and purpose. AtWork! In Washington used an off-site staff retreat to discuss goals and direction.

Support policy that emphasizes integrated employment. Many of the T-TAP mentor agencies implemented clear policy changes as part of their own development process. This included eliminating new admissions into their sheltered workshops and discontinuing activities that were not consistent with finding community employment. Mentors encouraged leadership staff to reconsider policy and practices that sent a mixed message to staff. Mentee changes included implementing an enhanced commitment to integrated employment by strongly urging all new referrals from VR to the workshop to consider community employment first. Another organization declined a new large workshop contract and negotiated instead with the business for individual job opportunities.

Engage all stakeholders, including board members, in defining a vision and goals for employment outcomes. Some organizations engaged in T-TAP experienced substantial leadership change but were able to maintain commitment to customized employment outcomes because of the groundwork laid with staff. These changes happened in the context of organizations that engaged board members and the larger community in discussing and developing the expanded focus on community employment and setting organizational goals and strategy. Mentors often met with boards and other stakeholder groups as part of the technical assistance process. These meetings helped role model the importance of engaging these stakeholders and also gave mentors a better understanding of the culture and support for the initiative within the organization.

Assess and support leadership buy-in. One of the significant predictors of success in expanding integrated employment is the extent to which there is buy-in from leadership, both at the executive and middle manager level. Mentors emphasized the importance of taking time to observe who the formal and informal leaders are in the organization. This insight can only happen with a significant time commitment to spending time on site talking to staff, customers, and other stakeholders at all levels in the organization. It is often the informal leaders, those who have power for whatever reason, who can sabotage system change if you do not have their buy-in. Mentors emphasized getting a clear understanding of the organization's vision, goals, operational commitments, and leadership and management commitments.

Help administrative staff see alternative structures and staff roles. While T-TAP required a visit from the mentee to the mentor, in most cases, the visit goals emphasized direct support staff roles and skills. Mid-level managers and direct support staff were usually the staff members that participated in these visits. However, in several cases, it was useful for only executive and administrative staff to visit and explore staff and budget allocation and team structure. This strategy was successful in giving an organization a concrete picture of how it would look once the change was

complete. In addition to contact with direct counterparts in the mentor organizations, the mentees found it helpful being on site to talk with finance and operations staff.

Understand what they want. Mentors emphasized the importance of asking the mentee to identify what the agency and staff were interested in learning. Although there are many opportunities for interaction and technical assistance, the agency is likely to best support the information that they are interested in receiving. Bob Niemiec, one of the T-TAP mentors, emphasized the importance of incorporating activities that responded to direct staff questions and needs. Discussing an onsite visit with Arc of Northern Chesapeake, he noted:

> *"On the second day of the visit, I had the opportunity to provide two training workshops to vocational and related staff. The first workshop involved responding to issues and questions that were raised by the group. It was successful in that participants decided the content of the training. The issues raised weren't unique to organizations like ArcNCR, but those issues affect each agency and individual differently. It helps to ease anxiety when staff realize that other organizations like theirs experience the same issues and struggle with the same kinds of challenges.*
>
> *The second workshop consisted of a prepared presentation about real work, real wages, and real opportunities for people with disabilities. Having had an opportunity to meet some of the job seekers from ArcNCR, I was able to weave their stories into the presentation to illustrate certain points. This proved to be an effective tool to personalize the experience for the people who were present.*
>
> *From the beginning, I stressed to the people from ArcNCR that I would learn as much (if not more) from them than they might learn from me. They were much further along than most organizations and deserved to be recognized for their efforts to achieve 100% employment. The mentoring experience must be a mutual learning continuum. Organizations that are the beneficiaries of mentoring may be exposed to new ideas, different approaches to similar challenges, and validation of their own progress. Mentors should be consistently challenged to stay up on the most current advances and issues in the field. They must be life-long learners. This mentoring experience has made me humble and provided me with another great example of an agency that puts its mission and principles into operation."*

Think outside the box. Cobb-Douglas Counties Community Service Boards has used a variety of creative funding strategies to support individual career goals. They have been leaders in thinking beyond typical jobs and using small loans and grants to help individuals design business or career opportunities. Resources used by this mentor agency that are more typical have included Vocational Rehabilitation, One Stop Career Centers, and provider agencies. One resource that is less familiar is the Micro Enterprise Center, which started out as a grassroots economic development initiative. In Georgia, United Way, as well as other foundations and endowments such as Hewlett-Packard, fund Micro Enterprise Centers. Microloans can be provided by these Centers and are usually in the neighborhood of $2,000 to $3,000 but can vary. Since Micro Enterprise Centers vary from state to state, it is important that people get to know how a Center operates in their own states. Some of the other financial options that Cobb-Douglas Counties CSBs have used include:

- Provider Short Term-Loans
- Individual Training Accounts and Individual Development Accounts
- PASS Plans
- Family Contributions and Donated Funds

The mentors from Cobb-Douglas Counties CSBs shared information with Anixter Center in Illinois on the use of micro-loans as seed money for both self-employment initiatives and loans for resource ownership. The mentors suggested that the Board at Anixter be approached about targeting a pool of money (perhaps $50,000) earmarked for helping create interest-free loans for some of the customized employment undertakings that lacked adequate funding. Another suggestion was made to establish a pool of money to cover the cost of other initiatives where acquiring money to support the initiative would not be immediate. In the interim, the services could be provided. This was in response to the "that is a nice idea but how are we going to pay for it." The hope was to free staff to be creative in their placement work to identify good match opportunities for job seekers. This would buy the agency time to demonstrate to the funding agency what is possible while relieving project managers of the immediate cost concern. Anixter then was able to approach multiple funding sources and ask for matching dollars with VR funds and thus create a larger pool of money.

Summary of Mentor Support Role in Organizational Restructuring

Organizational restructuring by CRPs focused on expanding customized employment is a process full of opportunities and challenges. For example, restructuring involves creating a longer-term strategic vision, communicating this vision clearly, and building broad-based support for the priority focus on integrated employment outcomes. Restructuring involves planning and implementing numerous shorter-term tactical steps that incrementally move the organization forward as envisioned in the strategic

plan. Moving forward with marketing and job development initiatives early on the restructuring process can create momentum that will drive the initiative forward. Each of the T-TAP mentors had substantial personal experience within their own organizations in this restructuring process. They understood both sides of the restructuring experience, the celebrations and missteps that can occur. As a result, mentors were positioned to provide within a peer-to-peer relationship a wide range of timely information, support, and encouragement to the mentee organizations.

Section 5

Elements of Employment Services Change

T-TAP mentor agencies were frequently able to assist TA recipient agencies with the delivery of employment services. For example, mentors helped in areas such as planning job placement services, job development strategies, and also addressing funding issues. The nature of the mentor agency as a peer often allowed the suggestions, tools, resources, and modeling to be heard in a different way than from how some input is received when given by outside consultants. As a peer, suggestions made were viewed as lessons learned or as "hey, this is what I tried. Let me know how you make out with it". Mentee agencies were sponges for information pertaining to what really has worked in other organizations. Often when a mentor reinforced advice given by another TA staff person, the advice was more readily followed by the mentee. The information that follows describes specific ways in which the mentor agencies influenced the TA recipients in the delivery of employment services and supports.

Approaches in Placement

When it comes to finding jobs in a truly customized manner, agencies were in constant need of fresh ideas, tools, and positive energies. Those new to community customized employment needed help thinking differently about approaches to supporting people in getting jobs. Those experienced in providing employment services might have had the basic skills. However, with customized employment, they moved to working with individuals with more complex support needs and/or exploring new employment options such as self-employment, resource ownership or even micro-enterprises. Also, changes in the economy caused shifts in labor availability and needs. As a result, agencies looked for the best approaches to employment services, expedient paths to success, or information about missteps to avoid.

To that end, mentor agencies within the T-TAP project were a tremendously helpful resource. They shared lessons learned, encouraged new approaches, modeled approaches, brain-stormed solutions, or re-vitalized staff members with encouragement, praise and a sense of hope. Mentors involved in the T-TAP project served as a comprehensive wealth of knowledge in assisting job developers and employment service teams.

Brainstorming and Problem Solving

Virtually every mentor reported spending a fair amount of time working with the placement staff on problem solving or brainstorming to support individual job goals. They shared information on ideas tried, tools developed, collaborations formed and the outcomes of real casework experiences. Many of the brainstorming activities revolved around career planning, job exploration, job development, job carving and job creation ideas. Issues around providing employment supports were also frequent topics for brainstorming. Mentee sites looked to the TA staff and the men-

tor agency for suggestions about job site supports, natural supports, fading and funding supports. The planned monthly call between the mentee and the mentor and TA staff person often included brainstorming on job coaching. The TA recipient agencies reported finding this assistance from their mentors very helpful. It was time that focused on helping the job developers do their jobs. Below are a few examples to demonstrate how this worked.

Magic Valley Rehabilitation Services (MVRS) in Twin Falls, Idaho, reported that their mentor, KFI, was tremendously helpful to all of their staff. The mentors began by visiting and observing staff in order to get to know them and their approaches. After that, when they would talk with the staff members, the mentors would already knew a great deal about how they approached their jobs. Next, the mentor was able to offer an overview of how the mentor worked with their own clients, and finally they offered feedback and suggestions to the staff at MVRS. On the monthly calls, the mentor would gather the team to use those times to brainstorm on very difficult cases. The brainstorming yielded many action steps for the staff. In addition, these brainstorming sessions modeled a group problem-solving approach.

KFI also worked with the staff at Friendship, Inc. in Fargo, ND. They helped the staff examine barriers to employment and to think creatively about how to address those barriers. Friendship staff described the work with the mentors as: "we put our titles aside and just talked. It was great that he [the mentor] was not trying to tell us what to do as a boss but rather as a peer that knows what we do. He offered helpful suggestions". This relationship also included the involvement of additional KFI staff beyond the assigned mentor. Friendship was able to benefit not only from the input of the mentor who was the executive director at KFI but also from KFI's job development team as they shared their knowledge and experiences.

Staff from Cobb-Douglas Counties CSBs in Georgia served as mentors for two sites, Anixter Center in Chicago, and AtWork, Inc. in Issaquah, WA. Both sites reported that it was valuable spending time brainstorming with their mentor. The Anixter Center also involved the mentor in brainstorming with family members and job seekers. A variety of ideas on job interests and possibilities were discussed. By actually meeting with everyone involved in the brainstorming session, the mentor could help with establishing some parameters that would lead to follow-up action.

Facilitating Person-Centered Career Planning

Direct mentor participation in facilitating or co-facilitating a career planning process allowed mentors to model the technique of person-centered career planning and to demonstrate the power of positive expectations. Effective person-centered planning provides the individual with a disability and their network of support a central, powerful role in the career development process. Bob Niemiec described his experience as a mentor as follows:

> *"During my first visit to the Arc of the Northern Chesapeake Region, I spent a great deal of time training different staff. I facilitated a career-planning meeting with Arc staff for a young woman who had recently entered their services. A major emphasis during the meeting was for me to model language. It was important to illustrate how the words we choose can impact the process and the people involved. Positive words and "people first" language were critical to making the point. After the event, I could see some of the people involved in the planning meeting edit their language. They were making a conscious effort to practice what they had witnessed."*

Observing and Modeling Employment Services

Virtually every mentor reported spending time in the community with the direct placement staff of the mentee agencies. They had opportunities to offer feedback and suggestions to the staff. The mentors also used these times to participate in the job development outreach strategies by modeling interactions with employers. Mentors had opportunities to see people who had been placed successfully, watch as they performed their jobs, and interact with co-workers and supervisors. Staff members had an opportunity to observe the mentors, be observed, and discuss new approaches. This direct involvement by the mentors in the community was found to be useful in both urban and rural settings. Examples of specific mentor-mentee experiences in observing and modeling employment services follow.

The Coastal Center worked with its mentor agency Rise, Inc. and found the two staff members from Rise who participated in the mentorship very helpful. Rise modeled some of their approaches to job development in order for the staff to have an opportunity to observe and then to try on their own. These observations helped the mentees explore new ways to interact with and market to the employers that they met. The mentors also had a willingness to share job development tools with the staff. "Overall, their input gave our team new found hope and energy."

There were two T-TAP TA recipient agencies in Oklahoma: Home of Hope in Vinita, and EmployAbility in Bartlesville. Both agencies had tremendous interest and needs in refining and developing enhanced marketing and job development skills among their staff. John Luna from Dallas MetroCare Services, an expert in the marketing and job development area, served as the mentor for Home of Hope and as a secondary mentor for EmployAbility. Feed-

back from the direct service staff and employment services managers at both programs indicated that the time spent with John Luna was invaluable. Both sites reported that their mentor helped them to learn about sales. One mentee commented:

> *"It allowed me to know that my barriers were common among others in this field. It helped me to feel less alone in the process of overcoming those barriers. Knowing that there was someone to talk to about successes and failures was the best part for me. Being able to ask 'stupid' questions was great as well. Selling yourself, selling the person, selling your agency, and with John, practicing by selling a tree in the lobby of a hotel to a complete stranger made me stronger and more confident."*

The mentors from KFI also reported an advantage of their field observations and modeling. One of the KFI mentors commented:

> *"I requested an opportunity to go on a site visit to watch the staff approach a new employer that had never been contacted. I had become familiar with the job developer already. I watched as this person went to this business at the wrong time of day when the manager was busy and preoccupied. The person did not read the cues being directed at her by the manager. There were many chances to schedule an appointment for a different day. I watched the person basically shatter any potential hopes of a job placement that day or any other day in the future, by not reading the signs."*

The mentor went on to say that later the staff person asked for honest feedback. The mentor had a chance to explain that he would have found a quieter time to go in to talk. He also suggested working on listening more and talking less. Finally, he suggested that she slow down when talking as she flew through what she had to say. When they returned to the agency, the mentor and the staff person role played the situation. The next time with an employer, the staff person did much better.

One mentor agency described the following situation in which he observed the job coach with a worker at the person's job site. Clearly in this situation, the mentor realized the importance of gentle guidance to help create a learning moment.

> *"While observing an individual working with the job coach, the job coach was very pleased and proud to introduce me and asked for my suggestions. I made several observations of problem areas, ranging from safety issues (wet floors-no signs), behavioral /performance issues (worker damaging work area), interpersonal concerns with coworkers nearby, and the supervisor relating to the job coach as if the worker was a non-entity. The job coach did seem to be aware of how I perceived the employee's work and that of the job coach. Afterwards, I asked the mentee to share more information about this placement and the support offered. This helped me understand the work that had been done on this individual's behalf and the gains that had been made. I then offered ideas based on my observations, while acknowledging the work that had brought this person this far. Though several concerns were noted in our discussion, they were placed in context with other gains, and I felt that the mentee left the conversation with areas to address and a willingness to make improvements. Ultimately, the person did not feel attacked, devalued or criticized."*

In addition, mentor agencies were able to influence practice on job development by providing training. One example occurred when Nancy Brooks-Lane and Doug Crandall worked with the staff and leadership of AtWork! The agency identified a need for self-employment training and other agencies in the Seattle area also were interested in developing their skills on this topic. The mentors went to Seattle to do the training, and AtWork staff handled the details and offered the training to area agencies. As a result, AtWork was able to meet its staff development needs while also meeting a training need in the region.

Help with Funding Issues

All agencies providing employment services share a common concern about funding. Community rehabilitation programs frequently have rates set at low levels, which result in their having to pay staff modest wages. When customized employment with the focus on individualized placements (not groups placements) is added to the employment options, concerns about increases in costs are often expressed by agencies new to using this approach. This is particularly the case when there are already concerns about limited funding available to the program.

Mentor agencies were extremely helpful in dealing with these funding concerns. They had dealt with the same concerns, and in fact, many of the mentors continued to work through funding issues faced by their own agencies. Therefore, the stories and strategies the mentors shared provided information and hope regarding seemingly complex financial questions. The mentors were willing to share insights, successes, and strategies, as well as time to commiserate with the TA recipients.

Often, in the process of brainstorming for job development, the conversation would move into funding for supports. Most mentor sites were a few steps beyond the TA recipients in their experimentation around funding. Some had pursued models of blending and braiding funding; others had more expertise with creative use of Pass Plans and Impairment Related Work Expenses (IRWEs). Others were working more with their Boards of Directors around development or the creation of loans for clients pursuing self-employment or resource ownership.

For example, at the mentee site MVRS, the local VR counselors had a tendency to recommend individuals with significant disabilities to the sheltered workshop program. MVRS staff discussed with the mentor how to make an argument to VR that all individuals are able to find employment in the community with the proper supports. With input from the mentor and the TA staff, MVRS worked to create a situation built on the presumption that all referrals were targeted for integrated employment / customized employment, not sheltered employment.

Summary of Mentor Support in the Provision of Employment Services

The T-TAP project took a proactive approach to encouraging mentee agencies to provide services focused on community integrated employment early in the organizational restructuring process. As a result, the mentors providing technical assistance had the opportunity to actually participate in marketing, job development, and job site support processes. Through demonstration, observation, discussion, and feedback, the mentors could directly assist the job development and employment support staff. This interactive process was longitudinal in nature, being spread over the two-year relationship between the mentor and mentee. This extended technical assistance period allowed the mentee agency time to test strategies, build on those that were effective, and redirect/correct those that were less effective. The mentor was a fully active participant in this organizational and staff development process focused on building an effective employment service program.

Section 6

Summary of Lessons Learned about Building Effective Mentor Relationships

Mentorship starts with a pool of talented professionals who are dedicated to the further development of the field by serving as mentors. T-TAP had the benefit of being a larger, multi-year project that had funds to support some travel costs and to facilitate the technical assistance during the early stages of the organizational re-structuring process for mentee agencies. The project was most fortunate to have a group of incredibly talented and experienced professionals serving as mentors who are passionate about their work and believe that it is important to share experiences with others. Although the focus was on using the T-TAP mentors to assist other agencies, most mentors reported that there was a mutual benefit to the experience. The important lessons learned about building effective mentor relationships are listed in the following table and expanded in this final section of examples.

Building Effective Mentor Relationships

- Establish the relationship: listen and learn.
- Identify circumstances that interfere with honest discussions.
- Define the relationship.
- Provide empathy and hope.
- Be helpful in meaningful ways.
- Find the informal and formal leaders.
- Learn what they do, when and how they do it, and why they do it this way.
- Examine who they know: help them utilize their networks.
- Practice humility and be willing to learn while mentoring.

Establish the relationship: Listen and Learn. Try to learn as quickly as you can about the agency. This includes the staff and their approaches to working with people, their consumers and family members. Learn about their hopes and concerns around integrated employment, their funding structures and relationships, their business and community opportunities, their board members, and their leadership.

Identify circumstances that interfere with honest discussions. Some staff members will not share information when in the presence of their supervisors or the leadership of an agency. Most consumers and family members do not want to say anything critical. Some people do not like formal settings and some people feel their opinions do not matter. All these variables influence whether or not a mentor can get an accurate picture of various perspectives. Talk to direct staff if possible away from their supervisors. Talk to other stakeholders alone as well (e.g., individuals with disabilities, family members, employers, funders). Listen carefully to their concerns and needs. Set up formal and informal meetings (over lunch, for example).

Define the relationship. Develop a relationship based on a clear understanding of what the mentee wishes to gain and what the mentor hopes to offer. Clarify how this process will proceed and how the outcome of the mentor / mentee relationship will be documented/measured.

Provide empathy and hope. Point out personal experiences with organizational restructuring that demonstrates an understanding of how hard the process is while also demonstrating that there is hope for a successful outcome.

Be helpful in meaningful ways. Advice and guidance is great! But, be willing to "roll up your sleeves" and work alongside the mentee. Share ideas or stories that were moments of growth for the mentor organization. Discuss things tried that didn't work and what was learned from these situations. Showing that the mentor has imperfections demonstrates that the mentor agency is just further on the same path. Sometimes sharing the "don'ts" is as important as sharing the "dos."

Find the informal and formal leaders. Everyone knows who the boss is, but every organization has influential people at a variety of levels. Determine who these people are. Find out if they are "with" the program or potentially going to sabotage efforts.

Learn what they (mentee staff) do, when and how they do it, and why they do it this way. Talk with the staff of the mentee agency and shadow them in the field. Understanding how people work provides a comprehensive look at how they train and orient staff. This will provide insight into whether there is a need for revamping their training. Knowing when they do things or gather information provides insight into their processes. Finally, learning why they do things a certain way may shed light on any variations from how they were trained. All this information helps identify influences on the employment services processes. What is the "bottom line" question? Does the staff collect adequate and timely enough information to do a good job match?

Identify who they know. Help the mentee utilize their networks. Does the agency have an approach or strategy for determining who the employers are in the community? How do they market their services to these employers or the local labor market?

Practice humility and be willing to learn while mentoring. This should happen naturally. Every agency has creative approaches, and there is something to be learned in every situation.

Feedback Guidelines: The Good, The Bad, and The Ugly

- Give honest feedback – positive and negative in a respectful manner.
- Present information as ideas to be considered. Be clear that suggestions made "with the best of intentions" are the mentor's perceptions of the mentee's needs.
- Acknowledge all that is going well, and all the efforts going into the work.
- Acknowledge sensitivity to the complexity and difficulties of the situation.
- Share lessons learned by similar practices and situations experienced.
- Don't avoid the truth. If there are issues, they need to know them. Work on the delivery of the message.
- If there are training needs, identify them; if there are legal or safety issues, make sure that you close the loop on the communication with a supervisor.
- Present observations in ways that are clear and objective but leave room for further rationale/discussions.
- Praise when possible but be honest too.

Summary

The purpose of this Guide has been to highlight strategies for utilizing mentors as a component of technical assistance to CRPs undertaking an organizational change. The mentor strategies detailed in this Guide are drawn from the five-year experiences of the T-TAP project. The Appendices that follow contain a variety of resources developed by T-TAP. These include extensive examples of strategies to address specific issues experienced at both the organizational and the direct employment service level for facilitating customized employment outcomes.

The examples are drawn from the direct experiences of the mentors and mentee organizations. Also included in the Appendices are resources referenced in the Guide such as a 30-Day Placement Plan, and Staff Time Logs. Finally, the Appendices include a variety of fact sheets on customized employment. These collective resources are intended to serve as training and technical assistance tools for use by community rehabilitation programs seeking to limit or eliminate use of Section 14c Minimum Wage Certificates through refocusing organizational structures and employment services to promote community integrated employment outcomes.

Appendix 1

Mentor Organizations

T-TAP CRP Leadership Network

Allegan County Community Mental Health, Allegan, Michigan
Mentor: Beth Durkee [bdurkee@accmhs.org]

Career Concepts is the employment services division of Allegan County Community Mental Health. Career Concepts supports people with developmental disabilities and serious mental illness working in various supported employment settings. The agency chose Career Concepts as its name because that is what staff tries to do every day. The mission is to have a real presence in the business community and develop employment outcomes based on what the market needs and what people want. Career Concepts works to help people attain competitive income and make new friends. One focus has been learning about and developing supported self-employment outcomes. The agency has leveraged VR dollars in different ways, developing and implementing individual budgets, PASS Plans and a very unique home grown revolving loan system that assists people attain capital to develop better self and wage employment outcomes.

The Arc of Stanly County, Inc., Albemarle, North Carolina
Mentor: Peggy Terhune [pterhune@arcofstanlync.org]
Website: http://www.arcofstanlync.org

Nationally accredited, Stanly Industrial Services (SIS) is one of the most diverse industries in the State of North Carolina with janitorial, food services, placement and labor outsourcing programs. SIS is designed to develop employment opportunities and alternative day services for individuals with disabilities. Vocational services are evaluation and assessment, job coaching, small business development, micro enterprise development, supported employment opportunities, and volunteer opportunities within the community for those who desire. The Arc of Stanly County, Inc. also manages an affirmative industry as well as a community rehabilitation program. Through extensive work skill training, on site or in local businesses, participants build skills toward employment and independence, and employers benefit from quality products and services. The SIS staff offers each individual a wide array of supports to accommodate each person's unique talents and abilities.

Career Design & Development Services, Dallas, Texas
Mentor: John Luna [JLuna@dallasmetrocare.com]
Website: http://www.dallasmetrocare.com/Careers/careers.html

Career Design & Development Services (a division of Dallas Metrocare Services) provides exemplary vocational services for persons with disabilities. The Goal of CDDS is to assist individuals in obtaining and maintaining employment in their career of choice in the community. On average, CDDS serves approximately 500 consumers per month. Community inclusion, vocational skills, and employment assistance are the basis for providing quality services for people with disabilities. Employers may also qualify for a

tax credit for hiring people with disabilities. Career Design & Development Services values assisting people with disabilities with dignity and respect. CDDS is an active member of six Chambers of Commerce in the Dallas area.

Career Support Systems, Inc., Richmond, Virginia
Mentor: Lance Elwood [lance@careersupport.net]
Website: http://www.careersupport.net

Career Support Systems (CSS), Inc., founded in 1993, is a successful and growing organization that is committed to helping people succeed in their communities and compete in today's complicated labor market. CSS supports a variety of customers in community-based settings, including: people with mild to severe disabilities, people with economic challenges (e.g., TANF recipients), and people with medical concerns. CSS has offices in Richmond, VA and rural far SW Virginia. Its mission is to promote independence and self-sufficiency by delivering exceptional community based employment services and supports.

Community Involvement Programs, Minneapolis, Minnesota
Mentor: Bob Niemiec [bniemiec@cipmn.org]
Website: http://www.cipmn.org/

Community Involvement Programs has a rich and varied history of supporting people with disabilities. Since its establishment in 1971, CIP has developed a broad array of services and supports for persons with developmental disabilities and their families and also for individuals with mental illness. While most programs are provided in the Minneapolis metro area, services are also provided to individuals and families in the Northern Minnesota Counties of Pine and Mille Lacs. Today, services strive to be responsive to the individual needs and preferences of each person and family supported. CIP firmly believes that each person and family has the right to experience a quality of life that reflects their choices and interests as well as their talents and abilities. Life experiences should also include relationships with family, friends,

The Cobb/Douglas Community Services Boards (CSBs), Georgia
Mentor: Nancy Brooks-Lane [nbrooks@cobbcsb.com]

The Cobb/Douglas CSBs are public agencies created by state law to provide mental health, mental retardation, and substance abuse services. The service areas of the agencies are Cobb County and Douglas County, Georgia. The agency supports over 300 people in competitive employment. The majority of funds utilized to provide services are generated through a contract with the State of Georgia, Medicaid and Medicare revenue, Vocational Rehabilitation, and grants. The agency's goals are: consumer preference; work initiatives; and the expansion of the availability and access to natural community supports through the reduction of stigma. The CSB has phased out sub-minimum wage and sheltered workshop programs over the last four years and through its active involvement in two Office of Disability Employment Policy Grants: 1) Customized Employment and 2) WorkForce Action. In addition, the CSB is a Project EMPLOY partner. The focus of the supports is personal choice, self-advocacy, self-determination, community inclusion, and competitive employment.

HPS, Helping People Succeed, Inc., Stuart, Florida
Mentor: Suzanne Hutcheson [shutcheson@hpsfl.org]
Website: http://www.tricountytec.org

HPS, Helping People Succeed, Inc. provides unique and valuable services that lead to improved quality of life and independence through community based employment, education and training programs for citizens of Martin, St. Lucie, Indian River, Okeechobee, Highlands, Polk, Glades, and Hendry counties. HPS's goal is to help each person have a successful future enjoying their life fully participating as productive taxpaying citizens. HPS also helps improve the community's economic viability and diversity through programs that assist children to become ready for school, and assists adults to find and maintain employment. Specific areas include Prevention and Early Intervention for families with children from birth to age five; Behavioral Intervention for families with children from ages five to twenty-one; Employment, Community Living and Supported Living services for adults with disabilities and adults who are transitioning from welfare to work or individuals who have other barriers to independent living.

KFI, Millinocket, Maine
Mentor: Jim Meehan [jbmeehan@kfimaine.org]

KFI is a regional provider of services to people with disabilities. The job developers get to know the needs of the business community and then work to find jobs that match people's requirements, interests and abilities. They then provide training and support for the person to be successful. KFI also supports people to live in their own apartment or home, and provides individual supports for people who live with their families or in other organizations' living arrangements, to become active and contributing members of their communities. They also have two inclusive preschools and provide case management for children with developmental disabilities. KFI is the 1999 Winner of AAMR's National Full Community Inclusion Award.

Rise, Inc., Spring Lake Park, Minnesota
Contact Person: Don Lavin [dlavin@rise.org]
Website: http://www.rise.org

Rise is a private, non-profit vocational rehabilitation agency that provides career planning, vocational training, employment, job placement, and sup-

port services to adults with disabilities and other barriers to employment. They also offer transitional housing and independent living skills services to adults who have mental health disabilities. Named Minnesota's Outstanding Community Rehabilitation Agency by its peers three times, it is a progressive non-profit corporation serving more 2,400 adults with significant disabilities annually.

Via of Lehigh Valley, Bethlehem, Pennsylvania
Contact Person: Corey Smith [c.smith@vianet.org]
Website: http://www.vianet.org

Via is a large provider agency that offer's employment, residential, community-based supports, inclusive childcare, and early intervention services to 1,000 consumers and families each year. Via has been aggressively converting all facility-based services to the community for a number of years. Their board of directors set a goal to provide all services in community-based settings by 2006. Agency President/CEO Ron Rucker and Director of Employment Services, Corey Smith have successfully led the full conversion of four workshops in three different states to community employment. Via is now converting its existing sheltered workshop by developing employment opportunities and making community connections.

Like most CRPs, Via has been struggled with attracting funding for valued community-based outcomes. As a large provider, the agency owns a number of buildings for facility-based services. Proceeds from the sale of these buildings are being used to offset the cost of providing high quality community-based services. Via also maintains a variety of other revenue producing ventures, including two thrift shops, special events, and a developing Internet resale business to support the agency's mission.

Appendix 2

Technical Assistance Recipients

2003 Technical Assistance Recipients

EmployAbility, Inc.
501 SW Virginia -- Bartlesville, OK 74003

The goals that EmployAbility set for the technical assistance provided by T-TAP included:

1. Improve its assessment and job development processes in order to make better job matches that are successful for the individuals as well as the businesses.
2. Develop internal training and staff development that will give its staff the necessary skills to develop competitive employment opportunities for the individuals served.
3. Develop and/or realign the organizational structure to support the development of competitive employment opportunities.
4. Improve its ability to do Customized Employment.

AtWork!
690 NW Juniper -- Issaquah, WA 98027
http://www.atwork-issaquah.com

The goals that At Work set for the technical assistance provided by T-TAP included:

1. Instill the expectation that every individual paid under the DOL 14c waiver will participate in training that will increase his or her competitive job skills.
2. Educate staff, clients, and families in alternatives to traditional employment outcomes, resulting in a wider variety of available options.
3. Develop a broader range of skills in those individuals served by At Work to create new options for non-stereotypic community jobs.

Babcock Center
PO Box 3817 -- Columbia, SC 29230
http://www.babcockcenter.org

The goals that Babcock Center set for the technical assistance provided by T-TAP included:

1. Transform the resources of the organization from center-based vocational programs to community-based and person-centered options.
2. Learn how to actively engage the people served and their family members in the planning and change process.
3. Assist people with significant disabilities to find and maintain competitive employment.
4. Use an assessment process that is based on the values and interests of the people receiving services.

5. Learn how to assist people with disabilities to start, own and be successful with their own businesses based on interests and desires.
6. Learn the art of creating and designing jobs around people with disability rather than trying to fit people into existing jobs.

Cranston Arc
905 Pontiac Avenue -- Cranston, RI 02920
http://www.cranstonarc.org

The goals that Cranston Arc set for the technical assistance provided by T-TAP included:

1. Provide information to families regarding employment and how employment may impact, their family member in areas such as work schedule, earnings and SSI, and day options when not working.
2. Develop an internal structure at Cranston ARC that will allow the agency to be flexible and responsive to the needs of the individuals as their work schedules dictate.
3. Utilize outside agencies to help identify and secure work for individuals.
4. Collaborate with other agencies for training, job staring, etc.

2004 Technical Assistance Sites

Charles River Industries
59 E. Militia Heights Road -- Needham, MA 02492
http://www.crarc.org/

The goals that Charles River Industries set for the technical assistance provided by T-TAP included:

1. Improve the organizational capacity to develop business relationships, especially among front line staff, through internal and external training.
2. Develop staffing patterns designed to maximize the time case managers spend developing individualized employment opportunities.
3. Develop community placements in economic sectors not previously tapped by their agency.
4. Create job opportunities for customers with significant challenges.

Hi-Hope Service Center
882 Hi Hope Road -- Lawrenceville, GA 30043
http://www.hihopecenter.org/

The goals that Hi-Hope set for the technical assistance provided by T-TAP included:

1. Eliminate barriers to community employment by educating staff, consumers, families and the community at large about its benefits.
2. Develop a comprehensive training program for community employment staff.
3. Establish successful methods for job development.
4. Explore other sources of funding.

Home of Hope, Inc.
P.O. Box 903 -- Vinita, Oklahoma 74301
http://www.homeofhope.com

The goals that Home of Hope, Inc. set for the technical assistance provided by T-TAP included:

1. Develop an action plan to move people into customized employment.
2. Develop and implement a marketing strategy targeted at current and potential business partners.
3. Construct a "road map" of finances and resources needed during the transition to customized employment.
4. Develop and deliver training to employees, focusing on change, maximizing resources, job development, individual job matches, customer satisfaction, and natural supports.
5. Create a culture of customized employment for persons with disabilities for all employment staff within the organization.
6. Create efficiencies by pooling the combined resources of employees and budgets working in different programs.

Humboldt Community Access & Resource Center (HCAR)
PO Box 2010 -- Eureka, CA 95502
http://www.hcar.us

The goals that HCAR set for the technical assistance provided by T-TAP included:

1. Improve assessment and job development processes in order to make high quality job matches that are successful for individuals as well as the employers.
2. Provide training and staff development that will give staff the necessary skills to develop competitive employment opportunities for consumers.
3. Learn how to assist people with disabilities to start, own and be successful with their own businesses based on their interests and desires.
4. Develop an effective marketing plan to change the image of Baybridge Employment & Work Services from a social service agency to an employment agency.
5. Develop and implement public relations material to market job seekers to the business community.
6. Expand the organization's contacts with business community and develop a Business Advisory Council.
7. Develop and implement a plan to involve all staff in marketing and public relations.

Magic Valley Rehabilitation Services
484 Eastland Drive South | Twin Falls, ID 83301
Contact: Merv Sullivan

The goals that Magic Valley Rehabilitation Services set for the technical assistance provided by T-TAP included:

1. Provide training to center-based staff.
2. Work with the state vocational agency to ensure the successful movement of participants from facility based workshop to competitive employment.
3. Provide training to Employment Services Specialists to better prepare them to create unique job opportunities for individuals supported by Magic Valley.
4. Explore the potential for self-employment of participants.
5. Reduce the number of participants receiving center-based services.

2005 Technical Assistance Sites

Anixter Center
2001 N. Clybourn Avenue, Suite 302 -- Chicago, IL 60614
www.anixter.org

The goals that Anixter Center set for the technical assistance provided by T-TAP included:

1. Enhance the advocacy skills of agency staff so that they can present the idea of community-based services more effectively.
2. Enhance the agency staff's ability to educate corporations and foundations about this change in philosophy in order to maximize resources.
3. Develop the agency capacity to find customized employment opportunities for job seekers with very significant disabilities.
4. Assistance in developing the procedures for implementing the project including a reasonable timeline to enhance the probability of early success.
5. Training in how to instruct service recipients and their family members to be active participants in selecting a job and employment location.

Coastal Center for Developmental Services, Inc. (CCDS)
1249 Eisenhower Drive -- Savannah, GA 31406

The goals that Coastal Center for Developmental Services set for the technical assistance provided by T-TAP included:

1. CCDS is committed to placing 60 individuals into Community Employment over the next fiscal year.
2. Increase the effectiveness with job creation to develop gainful employment for individuals with multiple disabilities to include significant physical disabilities and dual diagnoses.

Friendship, Inc.
801 Page Drive -- Fargo, ND 58103
http://www.friendship-inc.com

The goals that Friendship Inc. set for the technical assistance provided by T-TAP included:

1. Increase access to community-based employment for people currently served in center-based services.
2. Enhance job development strategies.
3. Reduce the use of Section 14(c) employment.
4. Increase access to employment & VR funding for people with significant support needs.
5. Successfully manage organizational change.

The Arc of DC
817 Varnum Street NE, Suite 229 -- Washington, DC 20017
http://www.arcdc.net

The goals that the Arc of DC set for the technical assistance provided by T-TAP included:

1. Eliminate barriers to community employment by educating staff, individuals with disabilities, families and the community at large about its benefits.
2. Establish successful methods for job development and employer training.
3. Provide training and staff development that will give staff the necessary skills to develop competitive employment opportunities for individuals with disabilities.

4. Create job opportunities for individuals with significant challenges.
5. Design a state-of-the art model for the District enhancing customized employment and job sustainability.
6. Design and implement a strong marketing and business plan to include the establishment of a Business/Employer Advisory Committee.

The Arc of Northern Chesapeake
4513 Philadelphia Road -- Aberdeen, MD 21001

The goals that The Arc of Northern Chesapeake set for the technical assistance provided by T-TAP included:

1. Increase the number of customers involved in individual community employment by 30. Individuals will be those who are:
    a. currently participating in group work situations (e.g., enclaves and mobile crews),
    b. un- or under-employed based on Individual Plan documented objectives.
2. Reduce the number of individuals who are employed under Section 14(c) of the Fair Labor Standards Act by 50% (5 individuals).

Appendix 3

Technical Assistance Resources

- Staff Log
- Organizational Survey
- Individual Consumer Outcomes Log

Summary Information for theTA Site Data Collection Tools

Implementing an organizational change process requires careful attention to both resources and outcomes. For organizations that are supporting individuals with disabilities in community employment the primary resource is staff time. Principal outcomes include individual's access to employment and the quality of the employment experience.

T-TAP assessed resources and outcomes at project sites using three tools developed by the Institute for Community Inclusion. The tools are designed to be used on a point-in-time basis, with minimal time commitment. T-TAP recipients implemented the Staff Time Log and the Individual Employment Outcomes Log every six months, and the Organizational Survey once every 12 months.

Staff Time Log

The goal of the Staff Time Log is to provide a snapshot of staff time investment across eight major activity categories. The Staff Time Log can be used to answer questions such as,

- Are staff spending too much time providing individual support?
- Are we shifting resources from facility-based services to community support over time?
- Are we investing enough in job development?

The Staff Time Log is completed for one full calendar week by all staff, with the possible exception of staff that have purely administrative roles (e.g. you may choose to not include the business manager or receptionist). Staff indicate the primary activity for each 30-minute interval during the day. Ideally staff will complete these as the day goes on and memories are fresh. If a staff member is out sick or on vacation, no hours should be recorded. It is important to be sensitive to staff concerns about using this tool. T-TAP provided postage paid envelopes so that staff could return the form directly to the project. Other organizations that adopt this tool may want to allow staff to complete it anonymously, either by having staff return Logs directly to an external evaluator or by having staff hand them in without identifying themselves. The goal is to look at organizational resource allocation, not individual staff performance.

Organizational Survey

The purpose of the Organizational Survey is to assess the extent to which staff have a common understanding of organizational values and strategies. The Survey asks them to indicate their agreement with statements that assess organizational practices, funding practices,

strategies for employment, personal experiences, and perceptions of changes in responsibilities and expectations. Staff may have concerns about providing honest answers to some of questions, and providing the opportunity to respond anonymously is important.

Individual Consumer Outcomes Log

This tool assesses the quality and quantity of individual outcomes by collecting a one-week snapshot of an individual's activities including the total hours spent during this week across five activities or jobs (individual employment, small group supported employment, individual community-based non-work activities, sheltered employment, and facility-based non-work services). Quality of employment measures includes wages, payroll status (is the individual on company payroll or program payroll), benefits, and the type of job. As in the other tools, data are collected for one week only. The actual hours in each job or environment for that week only should be recorded, even if an individual is on vacation or otherwise has an atypical week. The goal is to assess trends in outcomes on an organizational level, and these variations will even out across the organization.

Individual Staff Time Log

Staff Name: _____

Organization: _____

Week Ending: _____

		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
A.M.	6:00 - 6:30							
	6:30 - 7:00							
	7:00 - 7:30							
	7:30 - 8:00							
	8:00 - 8:30							
	8:30 - 9:00							
	9:00 - 9:30							
	9:30 - 10:00							
	10:00 - 10:30							
	10:30 - 11:00							
	11:00 - 11:30							
	11:30 - 12:00							
P.M.	12:00 - 12:30							
	12:30 - 1:00							
	1:00 - 1:30							
	1:30 - 2:00							
	2:30 - 3:00							
	3:00 - 3:30							
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	5:00 - 5:30							
	5:30 - 6:00							
	6:00 - 6:30							
	6:30 - 7:00							
	7:00 - 7:30							
	7:30 - 8:00							
	8:00 - 8:30							
	8:30 - 9:00							
	9:00 - 9:30							
	9:30 - 10:00							

For more information contact: John Butterworth, Institute for Community Inclusion
-john.butterworth@umb.edu or (617) 287-4357

Include all your work hours, including those not assigned to community employment.
Write code number for the primary activity conducted during each interval.

Please Summarize on Back of Form

1	On-the-Job worker training or support for a Community Employee in an individual job including meetings with employer, but not including job development
2	On-the-Job worker training or support for a Community Employee in group supported employment including enclaves or mobile work crews employing no more than 8 individuals.
3	Off-the-Job worker training or support for a Community Employee (e.g. counseling, skill training, case management, phone calls, meetings, paperwork,...) but not including job development
4	Job development, including employer and community outreach with or without the consumer
5	Training, support provided in a sheltered workshop or other program setting
6	Community-based non-work support
7	Travel with consumer (e.g. transportation to work or interviews)
8	Travel without consumer
9	Others

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Staff Time Log Overview and Summary

The staff time log form provides a one-week snapshot of staff effort. While some organizations choose to maintain this time log on an ongoing basis, more typically it would be used once every 3 to 6 months to assess trends. Each staff member should complete the form for one week, Monday through Sunday.

Code	Activity	Notes
1	On-the-Job worker training or support for a Community Employee in an individual job including meetings with employer, but not including job development	Include only support for individuals working in individual jobs and receiving 1:1 support.
2	On-the-Job worker training or support for a Community Employee in group supported employment including enclaves or mobile work crews employing no more than 8 individuals	Typically this is defined as more than one worker who are supported by the permanent presence of a job support professional. Enclaves or work crews with more than 8 employees with a disability should be reported as program-based training and support.
3	Off-the-Job worker training or support for a Community Employee (e.g. counseling, skill training, case management, phone calls, meetings, paperwork,...) but not including job development	This category is intended to capture supports provided away from the work place that support or facilitate community employment.
4	Job development, including employer and community outreach with or without the consumer	
5	Program-based training and support: Training, support provided in a sheltered workshop or other program setting	All time providing direct program support in a program setting including sheltered workshop or day habilitation programs.
6	Community-based non-work support	All time spent supporting community participation or individual community activities including volunteer work, using a health club, continuing education, or small group activities in groups of no more than 3 individuals with a disability.
7	Travel with consumer (e.g. transportation to work or interviews)	
8	Travel without consumer	Travel between job sites or to meetings with employers
9	Other	Includes general case management responsibilities (e.g. ISP meetings), staff meetings, inservice training

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john.butterworth@umb.e lu or (617) 287-4357

Summary of Organizational Staff Log
(insert total number of intervals from front of from)

Code	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	TOTAL
1								
2								
3								
4								
5								
6								
7								
8								
9								

For more information contact: John Butterworth, Institute for Community Inclusion
john.butterworth@umb.edu or (617) 287-4357

Staff Survey

This questionnaire has been designed to help staff assess the change process in your organization. It will also help to inform the type of technical assistance your organization receives by defining areas of progress as well as areas of need. Thank you in advance for your participation.

Part 1: Demographics

1. Gender: ____Female ____Male

2. How long have you been at your organization? _____/_____
   Yrs. Mos.

3. Today's date: ___/___/___

4. Your job title:

5. In which age group are you? (please check only one)
   ____ 18-25
   ____ 26-35
   ____ 36-45
   ____ 46-55
   ____ 56-65(+)

6. What is the highest level of education that you have completed? (please check only one)
   ____ Some high school
   ____ High school
   ____ Some college
   ____ 2 year college (Associate's Degree or equivalent); please indicate major
   ____ 4 year college (Bachelor's Degree); please indicate major _____
   ____ Master's Degree; please indicate field of study _____
   ____ Doctoral Degree; please indicate field of study _____

7. How many years have you been working in this field? _____ years

8. What is your race/ethnic origin?
   ____ Asian
   ____ Black, non-Hispanic or Latino
   ____ Black, Hispanic or Latino
   ____ White, non-Hispanic or Latino
   ____ White, Hispanic or Latino
   ____ Native American or Alaskan Native
   ____ Native Hawaiian or other Pacific Islander
   ____ Other, please specify

Part II: Organizational Practices

To what extent do you agree with the following statements?
Please circle the corresponding number that best reflects your level of agreement on a scale of 1-5 (1 indicating "strongly agree" and 5 indicating "strongly disagree").

1	2	3	4	5
Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree

9.	My organization has a formal, written commitment to expand community employment.	**1**	**2**	**3**	**4**	**5**
10.	My organization has an informal, assumed commitment to expand community employment.	**1**	**2**	**3**	**4**	**5**
11.	My organization has performance goals around the number of individuals who participate in community employment.	**1**	**2**	**3**	**4**	**5**

12.	Consumers receive supports for jobs outside the traditional 9-to-5 work hours.	1	2	3	4	5
13.	Community employment is identified as the preferred outcome for all new service recipients.	1	2	3	4	5
14.	Community employment is identified as the preferred outcome for all people currently being served by my organization.	1	2	3	4	5
15.	There is no new enrollment at my organization's sheltered workshop.	1	2	3	4	5
16.	Staff are sometimes excused from their typical duties to attend trainings.	1	2	3	4	5
17.	Staff are supported to spend time in the community, building connections with community members and potential employers.	1	2	3	4	5
18.	There are formal mechanisms within my organization that allow me to be involved in the planning process.	1	2	3	4	5
19.	Consumer choice and control is encouraged among individuals at my organization.	1	2	3	4	5
20.	Outside stakeholders, such as family members, have the opportunity be involved in my organization's planning process.	1	2	3	4	5
21.	My organization has engaged in strategic planning to close its sheltered workshop.	1	2	3	4	5

Part III: Funding Practices

To what extent do you agree with the following statements?
Please circle the corresponding number that best reflects your level of agreement on a scale of 1-5 (1 indicating "strongly agree" and 5 indicating "strongly disagree"). Please circle DK for "don't know."

1	2	3	4	5
Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree

22.	Multiple funding sources (e.g. Medicaid, state vocational rehabilitation agency, etc.) are used to fund community employment.	1	2	3	4	5	DK
23.	Funds are being shifted from other day services to community employment.	1	2	3	4	5	DK
24.	Funds are being shifted from other day services to sheltered employment.	1	2	3	4	5	DK
25.	Dollars follow the individual from sheltered workshop or other day program activities to community employment.	1	2	3	4	5	DK

Part IV: Strategies for Employment

To what extent do you agree with the following statements?
Please circle the corresponding number that best reflects your level of agreement on a scale of 1-5 (1 indicating "strongly agree" and 5 indicating "strongly disagree").

1	2	3	4	5
Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree

26.	With proper supports, all individuals with MR/DD are capable of real work.	1	2	3	4	5
27.	Enclave and similar models provide a useful transition step in readiness for individualized, community employment.	1	2	3	4	5
28.	Community employment should be available to those for whom it is an appropriate placement, but is not appropriate for every individual.	1	2	3	4	5

29.	Sheltered workshops are the best options for some individuals.	1	2	3	4	5
30.	The comfort level of individuals with MR/DD and their families increases when they have a "full menu" of services among which they can move: competitive employment, individual supported employment, enclaves, workshops, day habilitation programs.	1	2	3	4	5
31.	Closure of workshops should be encouraged.	1	2	3	4	5

Part V: Personal Experiences

To what extent do you agree with the following statements?
Please circle the corresponding number that best reflects your level of agreement on a scale of 1-5 (1 indicating "strongly agree" and 5 indicating "strongly disagree").

1	2	3	4	5
Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree

32.	I feel satisfied with the type of change that has gone on in my organization regarding expansion of community employment.	1	2	3	4	5
33.	I feel supported to help people we serve find community employment.	1	2	3	4	5
34.	I worry that the change from sheltered employment to community employment threatens my job security.	1	2	3	4	5
35.	I have received regular communication from my organization's leadership about the organization's goals and plans.	1	2	3	4	5
36.	My organization has done enough to alleviate my anxiety about moving individuals that we serve into community employment.	1	2	3	4	5
37.	I feel comfortable discussing issues surrounding my organization's expansion of community employment.	1	2	3	4	5
38.	I have participated in my organization's planning regarding expansion access to community employment.	1	2	3	4	5
39.	I feel supported by my organization to help families and individuals understand the change process regarding the expansion of community employment.	1	2	3	4	5
40.	I have some say in the way this organization is run.	1	2	3	4	5
41.	When changes happen that directly affect my job responsibilities, my concerns and skills are considered.	1	2	3	4	5
42.	My opinions are important to the leadership of this organization.	1	2	3	4	5

43. Please list some ways that your responsibilities have changed since your organization has begun expansion of community employment.

44. Please list some ways that your expectations have changed about your position and your organization during its expansion of community employment.

45. Please describe some strategies that your organization has used to support staff while expanding opportunities for community employment for the individuals that you serve.

T-TAP – Training and Technical Assistance for Providers Project
Please direct questions to Dr. John Butterworth, Institute for Community Inclusion
(617) 287-4357 or john.butterworth@umb.edu

Thank you very much!

Day	Time	T-TAP Staff	Explanation
1	8:00 - 9:00 a.m.	*Introductions*	General introductions of key staff that will be working on the TTAP project over the two years.
1	9:00 - 10:30 a.m.	*Tours of main offices and workshop(s).*	Walk through of the facilities that are located at the main office building and any nearby buildings.
1	10:30 - 11:30 a.m.	*Interview / meet with group of consumers.*	This can be a couple of small group meetings in order to meet a variety of individuals in your programs. The purpose is to gain an understanding of what individuals are doing on a daily basis and what their employment goals are.
	11:30 - 12:30 p.m.	*Interview with Executive Director / CEO.*	General interview to get a feel for where the agency is at and where the ED and Board would like to see the agency in the future.
1	12:30 - 1:30 p.m.	*LUNCH*	(Lunch can also be a working lunch with staff or consumers that you feel it would be important for us to meet)
1	1:30 - 3:30 p.m.	*Interview with T-TAP Manager.*	This should be the person who will be most involved with implementing the work done through TTAP and the main contact person for this grant. For some agencies, this might be the ED / CEO. It will be a more intensive interview than the one with the ED to understand the structure of the agency at this time, including resources, staffing, funding, and goals for future.
1	3:30 - 4:30 p.m.	*Attend all staff meeting.*	This meeting will consist of an explanation of the project for all staff and information about the data we will be collecting over the two years. Staff will also be asked to fill out a short survey about their jobs.
2	8:00 - 11:00 a.m.	*Tours of current community employment sites and enclaves. Visit other facilities.*	Visiting a variety of sites to get a better understanding of the scope of work your agency does would be most helpful.
2	11:00 - 12:00 noon	*Meet with staff from funding agencies.*	Staff from funding agencies who are able to talk about what types of services they would like to be funding in the future would be ideal for this. If your agency has multiple funders, meeting as many as possible would be helpful.
2	12:00 - 1:00 p.m.	*Lunch with family members of consumers in your programs.*	A variety of family members would be helpful (i.e., someone whose family member is currently in your workshop, work-ing in the community and in an enclave). This could also be done after work if that is more convenient for the family members,
2	1:00 - 2:30 p.m.	*Interview with Vocational Program Manager.*	This should be someone who can talk to how individuals are currently moving from sheltered to community employment.
2	2:30 - 3:30 p.m.	*Interview with small group (2-5) of job developers.*	This group should consist of staff who are out talking to employers about hiring individuals from your programs.
2	3:30 - 4:30 p.m.	*Interview with small gorup (2-5) of front line staff.*	This group should consist of staff who are working with consumers on a daily basis. Staff such as job coaches, case managers, employment training specialists or any other staff involved with assisting individuals with their vocational plans would be appropriate for this interview.
3		*Training for staff on Person Centered Planning and/or Job Development*	Before arriving for the site visit, TTAP staff will discuss with you which training would be most helpful for your staff and will customize the one day training to meet your needs.

**This is a draft schedule. We do not expect your agency to be able to schedule all of these meetings in the exact order. What we do hope is that you will be able to schedule all these activities in the two days we will be at your agency. If you have any questions about the activities, please feel free to contact us.

Structured Interview General Questions

General Agency Information:

Copy of Mission/Strategic Plan

Copy of Organizational Chart

Total # of Staff in agency: ____ FT ____ PT

# of Staff in vocational programs: ____ FT ____ PT

How are vocational staff organized (specialist vs. generalist)?

Total # of people w/disabilities in vocational programs _____
_____ In house
_____Community Employment (# in enclaves _____, # in individual jobs_____)

How many people currently working are paid under minimum wage? # In house: _____ # in community _____

Funding Sources:
____ VR
____ MR/DD
____ MH
____ Insurance
____ Medicaid Waiver
____ Other

What is the nature of funding mechanisms?

What are your reimbursement rates?
_____ Day Rate
_____ Hourly Rate
_____ Flat Rate

Structured Interview with Executive Director

What does your agency do well?

What do you think your agency needs to improve in?

Community Employment:

If you have started to do community employment, what have been your efforts up to date?

When did you start?

How has it been going?

What lessons have you learned in the process?

Have you used any outside TA or Training?

About the Board:

Make-up of board (consumers, family, family, employers, etc.)

What role, if any, did they have in this proposal?

Overall receptiveness to change?

Board member views on Community Employment?

Board member views on workshops & segregated employment?

What do you think their response will be to reduce the use of 14C?

What has been their response to previous attempts to increase community employment?

What is their commitment to change?

How can they best be utilized? How should they be involved in this project?

Financial Resources:

Have your funders supported community employment?

Are there funding related barriers to community employment?

Have funders changed their expectations around community employment?

Can you talk a bit about your agency's financial stability? (Diversified, tight)

- What is the risk tolerance of your funders?

- How conservative or rigid are your funding agencies?

Is there potential funding for community employment in the future?

How should your funders be in involved in this project?

Staffing at Agency:

What is their level of satisfaction with business as usual?

What will their response be to community employment and reduction of 14c?

Does the staff know the agency is thinking about reducing the 14C waiver utilization? ____ Yes ____ No

If no, what are the plans for telling them?

Management:

How do decisions get made in the organization?

How do you evaluate program outcomes?

How does supervision work within the organization?

Are there goals for each department?

Are there individual staff goals?

How are staff views solicited and incorporated into the planning and running of the organization?

Family Members:

What is the role of family in your organization?

What will their response be to community employment and reduction of 14c?

Do they know agency is thinking about community employment? ____ Yes ____ No

If no, what are the plans for telling them?

How does agency communicate with family?

How should they be involved in this project?

Consumers:

What is the role of the consumer in your organization?

What will their response be to community employment and reduction of 14c?

Do they know the agency is thinking about reducing the 14C waiver utilization? ____ Yes ____ No

If no, what are the plans for telling them?

What is the communication mode with consumers?

Community Members:

What is the community perspective /understanding of your agency?

What is your agency's involvement in the community?

Who are the major employers in your community? What industries are in your community?

How does agency communicate with the community?

Other Resources Used:

____ One-Stops
____ Training resources (local, state, regional)
____ Community Groups
____ Benefits Planning
____ TA

What has been useful?

What has not been useful?

T-TAP Project:

What are the needs of your agency in thinking about increasing community employment?

What would your agency like to get out of the TA available through the project?

What training would you find helpful?

What would you like from your mentor agency?

What are your outcome goals for this 2-year intervention?

Structured Interview with T-TAP Manager and/or Program Manager

What does your agency do well?

What do you think your agency needs to improve in?

Community Employment:

If you have started to do community employment, what have been your efforts up to date?

When did you start?

How has it been going?

What lessons have you learned in the process?

Have you used any outside TA or Training?

Financial Resources:

Have your funders supported community employment?

Are there funding related barriers to community employment?

Have funders changed their expectations around community employment?

Can you talk a bit about your agency's financial stability? (Diversified, tight)

What is the risk tolerance of your funders?

How conservative or rigid are your funding agencies?

Is there potential funding for community employment in the future?

How should your funders be in involved in this project?

Staffing at Agency:

What is their level of satisfaction with business as usual?

What will their response be to community employment and reduction of 14c?

Does the staff know the agency is thinking about reducing the 14C waiver utilization? ____ Yes ____ No

If no, what are the plans for telling them?

What level of turnover is there within your agency?

How long have most of your staff been working at your agency?

Who does Job Development?

How many staff?

Others?

Describe the job development process?

Where do the contract procurement people fit in the organization?

Where are they located?

What will their response be to the reduction in 14c and push for community employment?

Are there leaders in favor of community employment? ____ Yes ____ No

If yes, what are they excited about?

Are there leaders in opposition? ____ Yes ____ No

If yes, what are the concerns?

Management:

How do decisions get made in the organization?

How do you evaluate program outcomes?

How do you evaluate staff?

Is there a peer or consumer review process?

How does supervision work within the organization?

Are there goals for each department?

Are there individual staff goals?

How are staff views solicited and incorporated into the planning and running of the organization?

Family Members:

What is the role of family in your organization?

What will their response be to community employment and reduction of 14c?

What is their understanding of the pros and cons of community employment?

What is their level of satisfaction with business as usual?

Do they know the agency is thinking about community employment? ____ Yes ____ No

If no, what are the plans for telling them?

Are there leaders in favor of community employment? ____ Yes ____No

If yes, what are they excited about?

Are there leaders in opposition? ____Yes ____No

If yes, what are the concerns?

How does agency communicate with family?

How should they be involved in this project?

Consumers:

What is the role of the consumer in your organization?

What do you think their response will be to community employment and reduction of 14c?

What sort of career planning is done with individuals?

What would you consider a successful outcome for an individual?

What is their understanding of the pros and cons of community employment?

Are there leaders in favor of community employment? ____ Yes ____ No

If yes, what are they excited about?

Are there leaders in opposition? ____Yes ____ No

If yes, what are the concerns?

Do they know the agency is thinking about reducing the 14c utilization? ____ Yes ____ No

If no, what are the plans for telling them?

What is the communication mode with consumers?

Community Members:

What is the community perspective /understanding of your agency?

What is the community perspective/understanding of people with disabilities?

What is your agency's involvement in the community?

Who are the major employers in your community?

What industries are in your community?

How does agency communicate with the community?

Other Resources:

____ One-Stops
____ Training resources (local, state, regional)
____ Community Groups
____ Benefits Planning
____ TA

What has been useful?

What has not been useful?

T-TAP Project:

What are the needs of your agency in thinking about increasing community employment?

What would your agency like to get out of the TA available through the project?

What training would you find helpful?

What would you like from your mentor agency?

What are your outcome goals for this 2-year intervention?

Focus Group / Interview with Staff

Staffing at Agency:

How long have you been working at your agency?

Before this visit, did you know the agency is thinking about reducing the 14c utilization?

What do you think about community employment and reduction of 14c?

Describe the steps you would take to get someone a job.

How do you go about doing contract procurement for the organization?

Thinking about community employment, what are you excited about?

What are you concern about?

Management:

How do big decisions get made within the agency?

How do staff views get communicated and incorporated in the running of the organization?

Family Members:

How does agency communicate with family?

How much contact do you have with family members?

What do you think their response will be to community employment and reduction of 14c?

Consumers:

What is the role of consumers in your organization?

What do you think their response will be to community employment and reduction of 14c?

Community Members:

What is your agency's involvement in the community?

Who are the major employers in your community?

What industries are in your community?

Other Resources Used:

____ One-Stops
____ Training resources (local, state, regional)
____ Community Groups
____ Benefits Planning
____ TA

What has been useful?

What has not been useful?

T-TAP Project:

What are the needs of your agency in thinking about increasing community employment?

What would your agency like to get out of the TA available through the project?

What training would you find helpful?

Focus Group / Interview with Consumers

Community Employment:

What type of work do you do every day in the workshop?

Do you go out in the community to work?

Do you know anyone from this workshop that has a job out in the community? ____ Yes ____ No

What do they think about their job?

What do you think would be good about working in the community?

What do you think would be bad about working in the community?

Has any of the staff here talked to you about what type of job you may want (career planning)?

What was that like?

What type of help do you think you might need to get a job?

Family Members / Support People:

Do you have anyone who helps you make decisions sometimes? ____ Yes ____ No

If yes, have you talked to them about working in the community?

What do they think about you getting a job in the community?

Focus Group / Interview with Family Members

Family Members:

What is the role of family members in the organization?

Before this visit, did you know agency is thinking about community employment?

What do you think about the idea of increasing community employment and reduction of 14c?

What are you excited about?

What are you concerned about?

How does agency communicate with you?

Consumers:

What is the role of consumers in the organization?

What do you think will be the response of your family member will be to community employment and reduction of 14c?

What is the communication mode with consumers?

Focus Group / Interview with Funding Agencies

Financial Resources:

Which funding source do you represent?

____ VR
____ MR/DD
____ MH
____ Insurance
____ Medicaid Waiver Other (specify):

What are your views on community employment?

What is your agencies overall view on community employment?

What is the financial stability of your organization? (Diversified, tight)

What is the risk tolerance of your funding agency?

How conservative or rigid is your funding agency?

Is your funding agency supportive of community employment? ____ Yes ____ No

Are there funding related barriers to community employment?

Has your agency changed its expectations around community employment?

Is there potential funding for community employment in the future?

T-TAP Project:

What do you think are the needs of the agency in thinking about increasing community employment?

Focus Group / Interview with Funding Agencies

Board Members:

What is the make-up of board (consumers, family, family, employers, etc.)

What role, if any, did you (or other board members) have in this proposal?

What is the overall receptiveness to change?

What are the board members views on Community Employment?

What are the board members views on workshops & segregated employment?

What will the board's response be to attempts to reduce the use of 14C?

What has been the response to previous attempts to increase community employment?

What is the board's commitment to change?

How can the board best be utilized?

Appendix 4

Strategies to Address Barriers to Organizational Change

This Appendix contains examples of organizational change strategies taken directly from the experiences of the T-TAP mentors. For each for the following examples, the organizational change barrier is defined, the strategy to address that barrier is described, and a specific application experience utilizing the strategy is presented. Please note that these examples were developed by the mentors and hence are written in first person language. In addition, there are stylistic differences in the presentations that have been not been edited.

Example 1: Allegan County Community Mental Health / Career Concepts

Organizational Barrier to Competitive Employment

Many communities have embraced supported employment as an add-on service with preconceived notions about the degree of implementation. This is due to a fear of staff job changes and outdated ideas on who people think can achieve competitive employment. In our organization, supported employment staff was a separate entity from the group that ran our workshops. When we put everyone to work who had approached us both internally and students transitioning, we had about 100 people working in the community. But, we still had 100 others attending our workshops. None of these people were being referred for supported employment services. It became pretty clear that we actually had a group of staff who were holding on a little too tightly to the past.

Strategy to Address Barrier

- We developed a formal organizational change strategy that now has all vocational services under one umbrella.
- We reorganized all services for people with developmental disabilities and discontinued employment staff being involved with activities that are not consistent with achieving competitive employment outcomes.
- When we developed our workshop conversion plan, we increased the number of staff working on employment to accelerate the pace with which we were able to develop competitive employment outcomes for anyone who wanted to make more money working in the community.
- When we went public about or conversion idea, we were met with spirited resistance from the community, lead by our ARC.
- We continued to learn that to make community employment a reality for all who wanted to work in integrated job settings, we needed to learn a lot more about business and attain better credibility in the business community.

Case Example of Organization Change Strategy

- We went through a strenuous quality improvement planning process to identify our values, strengths, weaknesses, and developed a plan of action for the future.

- We changed staff roles and job descriptions and only lost one staff person based on differing values.
- We trained all staff on the value and skills necessary to support people working in competitive jobs in the community.
- We worked closely with our ARC every step along the way and were held to high standards for planning and better employment outcomes.
- We learned more about Social Security and work incentives than ever before and have developed an internal benefits department to help folks make more money and maintain benefits.
- We have put a lot of effort into learning a great deal about supported self-employment and all of the details that are now helping us develop the expanded number of improved wage and self-employment outcomes that have revitalized our customers and staff.

Example 2: Arc of Stanly County

Organizational Barrier to Competitive Employment

Many programs that use Section 14c Minimum Wage Certificates are performing center-based contract work. These centers were often started with the purpose of having a "safe haven" for people with disabilities. People would be able to work and be productive without risking exposure to the community. A key barrier to competitive employment is the perspective of parents that their adult children are incapable of community work and vulnerable to exploitation in the greater community.

In the late 1980s, the Arc of Stanly County attempted to initiate a change strategy that would allow workshop closure within a three-year period. This change strategy was explained to consumers and their families with very negative results. Some families began a mud slinging campaign in the news. Another group of families broke off into their own agency to make sure their children did not have to go into the community. Other parents expressed helpless dismay. The community was angry that people with disabilities would be put in community workplaces and take jobs away from people without disabilities. The outcry was so large that the agency abandoned the idea of workshop closure.

Strategy to Address Barrier

Staff, consumers, families, funders, and community members have all believed that certain people were unemployable. Therefore, the Arc of Stanly County, Inc. began a slow campaign to create inclusive volunteer opportunities for people with disabilities. This would enable staff to see the difference in individuals when engaged in meaningful work of their choosing. Families would feel safer at allowing "volunteering", as supervision would be present at all times, and "volunteering" tended to be in places with which the family was comfortable. Funders would learn that goals could be worked on in community volunteer settings. Consumers would begin to experience work environment other that the sheltered site, and would begin to clamor to move out of the workshop. People with no experience in competitive work would be able to "try on" different jobs by volunteering. People might decide a volunteer opportunity was not what they really thought it would be like and that they would rather pursue something else. Finding this out in a volunteer capacity would be better than creating a poor work history with short-term jobs. We believed using a volunteer program would enable more people to become competitively employed and moved off the 14c minimum wage certificate.

Case Example of Organization Change Strategy

The volunteer program proved to be a good solution to begin to break down the real and perceived barriers. Volunteers began working at the hospital folding towels and moving supplies; public and school libraries putting books away; nursing homes helping with activities, visiting individuals without families, calling Bingo; the Department of Social Services shredding paper; the Chamber of Commerce putting together newsletters; Meals on Wheels delivering meals as well as working at nutrition sites; the Community Table (food kitchen for the homeless) serving food, putting ice in cups, and cleaning up; a local barbershop sweeping and dusting; the local animal shelter playing with animals; a local horse breeder exercising horses and taking care of hooves; a day care answering phones, rocking babies, reading to children, and helping with snacks; the local elementary Charter School reading to kindergartners; visiting individuals in the community and washing/walking dogs, etc.

When the position is a volunteer position and would be done by any other volunteer, the individual with a disability is not paid. When someone other than a volunteer would normally do the position, the person is compensated (i.e. dog owners pay to have their dogs washed), per Department of Labor regulations.

Individuals with disabilities began looking forward to these opportunities, and even those who initially refused a volunteer activity began to ask to go when they heard their friends talk about how much fun they'd had. People with disabilities began identifying dreams, and acting on those dreams to find competitive work or open their own micro-enterprises. Families saw the difference in the consumer's behavior, and were pleased and allowed more risk to be taken. Children in the community who were exposed to people with disabilities became very accepting of the adults who were "different". The community discovered that people with disabilities were "people first", not individuals to fear or shun. Several of the volunteer activities were expanded and became full or part time jobs for individuals, or people were hired into jobs as a result of community members learning about the volunteering, such as at the barbershop and a car wash.

Even staff was amazed. At one point, a video had been taken of a consumer working in the community. A long-

term staffer walked by the video showing on the TV in the cafeteria, and asked who the consumer was! The consumer's behavior was so different in the community than in the sheltered site that the staff person was not even aware that the person in the video was the same person she saw in the sheltered site. Staff also came to enjoy the volunteer activities as much as the consumers.

This experience also helped build real inclusive opportunities for people by creating relationships in the community. For example, the Chamber of Commerce calls and asks for a specific person when they need assistance, and other volunteer positions have also developed into opportunities to develop relationships in the community for consumers. In addition, places that are used for volunteering remember the agency and will call the agency when a competitive opening occurs. Due to this program, people are now employed competitively, have started their own micro-enterprises, and have increased opportunities for inclusive relationships in the community.

Example 3: Career Support Systems, Inc.

Organizational Barrier to Competitive Employment

During the summer of 1999, our organization was approached by a local Vocational Rehabilitation Manager in rural far Southwest Virginia and asked to consider attempting to absorb three local supported employment Group-Option contracts that provided employment for approximately 20 customers. The local public Mental Health/Mental Retardation/Substance Abuse service provider had recently decided to discontinue its vocational services in favor of providing facility based Medicaid MR Waiver Funded Day Support. Each of workers earned sub-minimum wages at the time.

Organizational challenges/barriers included:

- No group option program in place
- No Group Option fee-for-service arrangement in place
- No DOL 14c Certificate in place
- State VR Regulations requiring 14c certificates for participation in State's Economic Development Fund
- No experience with, or desire to pay, sub-minimum wage
- No prior cost basis on which to project actual labor costs
- No funding for start-up (equipment / supplies / vehicles)
- Little time to assess worker production rates
- Little time for bidding /contract re-negotiation process

Strategy to Address Barrier

Career Supports Systems (CSS) proceeded with bids to each of the host companies and subsequently established contracts with each. While we did not feel comfortable paying our workers sub-minimum wage, we had no true cost data on which to build a budget. We decided to proceed with our application for DOL 14c Certificate. During the first six months we performed time studies, wage surveys, and kept all required DOL documentation. We quickly learned that while many of our workers did not work at 100%, many were able to make large gains in productivity. We experimented with alternative job duties and instructional techniques and we were also able match some slower workers with work tasks that were less production-oriented. We also learned that our staff spent an inordinate amount of time meeting all of the DOL documentation requirements. This was time spent that could be redirected toward the provision of employment supports. We decided within the first year to increase the wage rate of every worker to the federal minimum wage level and eliminate the administrative burden associated with 14c compliance.

Case Example of Organization Change Strategy

Our group-option employment staff workers were relieved of all duties associated with DOL requirements and documentation, which allowed them to focus more of their energies on supporting workers with disabilities. Several additional organizational benefits were realized including:

- Streamlined payroll processes
- Reduced administrative time spend in DOL monitoring and compliance
- Reduced DOL related staff training time
- Improved worker morale and wages

Example 4: Cobb/Douglas Counties Community Services Board

Organizational Barrier to Competitive Employment

In 1999, the Developmental Disabilities Services of the Cobb and Douglas Counties Community Services Boards operated four sheltered workshop programs. The state funding streams reinforced facility-based services, and the majority of the parents of the folks attending the workshop was elderly and did not want changes to be made in the service system. Additionally, several of the staff had worked in the program for many years and were also most comfortable with the facility-based model. At that time, shifting from a facility-based program to one providing community based supports was not a priority for the Boards or leadership staff.

Strategy to Address Barrier

The overall conversion process involved the following strategies:

- Flatten the management structure.
- Shift staff roles from providing facility-based services to community-based supports. A carefully planned program of staff development is key to the success of this shift in staff roles to community-based supports.
- Phase-out sub-minimum wage contracts.
- Form self-directed work teams.
- Close one facility site.
- Convert the other sites to a community-based resource.
- Meet with families individually and in small groups.

Case Example of Organization Change Strategy

The following staff development activities were conducted to support staff as the moved from providing facility based services to community-based supports:

- 1999 - Converted traditional sheltered workshop staff to community-based employment consultants placing more emphasis on supported employment. New CEO was hired who was open to innovation.
- 2000 - Instituted weekly on-site training curriculum using the Supported Employment handbook "A Customer Driven Approach for Persons with Significant Disabilities" published by the VCU RRTC. These weekly chapter-by-chapter training sessions laid the foundation for providing employment services and prepared staff for the next level of new skill acquisition.
- 2001 - Provided new skill sets to all Employment Consultants using The University of Georgia/Human Services Management Institute to provide on-line job coach certification to 25 staff.
- 2002 - All participants graduated from The University of Georgia job coach certification.

  Monthly on-site trainings were begun with Cary Griffin, Dave Hammis, Melinda Mast, Mark Hill, and Steve Hall to further the staff skills in:
  - Work World Software/Decision Support Technology
  - Vocational Profiling
  - Systematic Instruction
  - Self-employment, Resource ownership, Business-within-a-business and job carving
  - Social Security Work Incentives
  - Using One-Stop generic supports to job develop

Example 5: HPS, Helping People Succeed, Inc.

Organizational Barrier to Competitive Employment

HPS, Helping People Succeed, Inc. is a 501(c)3 organization located in a 3 county area where the primary jobs are minimum wage service industry jobs and the population is made up of retirees. The majority of obvious jobs within the community were food service, janitorial, retail and flower farms. Most of the staff had been with the organization for a number of years and were very content with the sheltered workshop concept—in fact, some felt that it was good for people who were mentally retarded to be separate from the rest of the community. Staff enjoyed taking care of their clients and felt the checks they received from their sub-minimum wages (averaging less than $10 for a two-week period) were adequate. There was no apparent reason to change.

Strategy to Address Barrier

In order to accomplish organizational change, staff had to own the process. They had to understand that individuals with disabilities had the same right and responsibility to work in the community as people who did not have a disability. The organization used the following steps to begin organizational change:

- Used a value clarification process to help staff understand what their own beliefs were. This system started very broadly and ended up with the staff member having to commit to their place in the conversion process.
- Staff was then asked to identify "clients" who could work.
- Funding was identified to begin the process.
- The Board of Directors redefined the organization's mission with input from staff.
- Funding was identified and a three-year plan developed to support the organization's plan.

Case Example of Organization Change Strategy

Following the values clarification process, staff was asked to identify individuals who could work. They were directed to ignore barriers to employment such as parental concerns, behavioral issues, transportation, etc. They were asked to just look at the individual and determine if he or she could work.

Management expected that maybe 25% of the organization's 175 clientele would be deemed eligible for competitive employment. Staff returned with their estimate—95% of individuals served at that time were deemed eligible for employment! -- We were on our way. Trusting staff and allowing them to be a major part of the process is one of the keys to success

Example 6: KFI, Inc.

Organizational Barrier to Competitive Employment

KFI's overall philosophy is to assist individuals to lead regular lives in their communities. Since sheltered employment and sub-minimum wages fall outside of this philosophy, the organization has made a concerted effort to end these practices. These changes have affected the entire organization in numerous ways from job descriptions and responsibilities to internal communications to the kind of space we need. To put it bluntly – we do not do anything the way we used to do it. It has taken many years to make these changes and innumerable approaches were used, but following are some of the major strategies we used.

Strategy to Address Barrier

- On-going examination of values and decisions. Having an agency mission and values that support inclusion is not enough. Each decision along the way needs to be held up and examined against these ideals.
- Find and work to create flexibility within funding and regulatory systems. Separating "guidelines" from actual requirements, deciding what is and is not important, finding "bridge" money.
- Recognize the importance of collaboration. Identifying people within the state system who can be helpful—cultivate allies.
- Understand that space defines what you do. Large "program" space will result in gatherings of people. Smaller or office space will make this impossible.
- Understand the importance of relationships between staff – emphasis on development of positive working relationship and internal flexibility (work schedules, job duties, etc.).
- With people supported – maintain ongoing relationships where appropriate, but assist people to have opportunities to become regular members of their communities with families – develop and maintain a positive working relationship with families. Between staff and the people they support – appropriate, committed, trusting relationship with those who staff supports.

Case Example of Organization Change Strategy

KFI's closure of all group work situations, including the sheltered workshop, and the elimination of sub-minimum wages have occurred within the larger context of the organization's movement away from specialized (segregated) and group programs to community and individualized supports. These changes have taken many years but were led by the early (and surprising) success of individuals who moved from the work activity center directly into supported employment. This early success caused staff to question the effectiveness of sheltered work settings in preparing people to be successful employees in community businesses. Also, other staff started to question the usefulness of conducting separate groups within a day program rather than individual approaches for non-vocational activities (e.g., meal preparation). Therefore, the entire organization began to rethink the need for groups and the isolation of people from their communities. This consistency throughout all aspects of the organization led to a major shift towards individualized community outcomes.

Example 7: Rise, Inc.

Organizational Barrier to Competitive Employment

Many community rehabilitation professionals do not receive adequate education and training to assist them in obtaining competitive employment and minimum or prevailing wage outcomes for adults with significant disabilities. The majority of rehabilitation staff is rarely exposed to evidence-based practices that are known to correlate with superior customer services and rehabilitation outcomes. Further, these competencies and training needs are not prioritized for new employees entering community rehabilitation careers.

Strategy to Address Barrier

With a goal to better train and prepare its direct service personnel, Rise, Incorporated, a community rehabilitation organization in Minnesota, conducted a study to identify the core competencies and personal qualities of its highest performing staff. The goal of this process was to isolate the qualities of its experienced high performers that distinguish them from other community rehabilitation staff. Which factors enable high performers to consistently achieve better outcomes, including competitive employment and wage benefits, for the agency's rehabilitation consumers? The desired organizational goal was to redesign a staff development and training curriculum for new and existing staff to increase high performance. Also, the agency was interested in restructuring job descriptions for its direct service staff to prioritize job functions, competencies, and qualities known to produce the best services and outcomes for business and rehabilitation customers.

Case Example of Organization Change Strategy

Launch of New Staff Development Training Program and Redesign of Job Descriptions.

Following its research of trade literature and an internal study of its "high performers," the core information was aggregated and prioritized by the agency's staff training committee. Afterwards, a publication was commissioned by the agency's staff training committee and written by one of its members. This publication, entitled Reach for the Stars: Achieving High Performance as a Community Rehabilitation Professional, has become the agency's framework for training its new staff and retraining existing staff.

The agency's staff training committee now schedules formal training events to nurture the development of skills and competencies that were found to correlate with high performance. All of the agency's existing staff was retrained within one year. And all new staff is now exposed to critical training events within one year of hire. The organization's high performers have been recruited to assist in the training of other agency direct service staff. Also, the staff training committee schedules training with outside speakers and consultants on topics relevant to these core job competencies. The agency has recently formed a subcommittee on "emerging practices" to insure that its direct service staff is continually exposed to high performance strategies that lead to better job and wage outcomes of program participants.

Finally, the organization has conducted a formal review of its direct service job descriptions and has modified and prioritized the job functions and competencies so they are now compatible with high performance outcomes. Core job functions and competencies were identified and ranked by the high performers in their order of importance using a Delphi consensus building procedure. The goal was to identify core skill sets that are crucial to better service outcomes. These job functions and skill sets hold high importance to the agency's managers and are used as a tool for recruiting new staff and determining their mastery of desired skills. Job competencies that are lacking now provide a conceptual framework for planning both agency-wide and individual staff development training.

Example 8: Via of the Leigh Valley

Organizational Barrier to Competitive Employment

Over the past five years Via, like many CRPs, began experiencing a slowdown in the number of people leaving the workshop for community employment. This decrease correlates with a nationwide leveling off of supported employment growth. Via's transition to integrated community employment outcomes stagnated for a number of reasons that are in-line with other CRPs of its kind. The employment staff began to do a significant amount of supported employment with transition graduates and new customers, and a lot less with people from the workshop. Root causes of this shift included a significant drop off in county funding, a service system imbedded in licensed programming, protective parents, and need for additional staff training.

Strategy to Address Barrier

The agency strategy is simple and closely models the concepts in the book, Closing the Shop by Pat Rogan. Via focuses on the concepts of self-determination and getting people competitively employed quickly by moving resources to follow the person not the program. The agency believes in the concepts of "one life at a time," teaching/telling the good story, and swiftly evolving organizational culture and structure to support these values.

Case Example of Organizational Change Strategy

- Educate families and supports coordinators on Social Security Work Incentives provided by Benefits Planning Assistance and Outreach (BPAO) staff (now WIPA).
- Convert individual budget money used for workshop funding to competitive employment follow-along services.
- Refine the focus of the employment staff back to working with people from the workshop.
- Develop financial/costing processes that to significantly increase efficiency, and recouping payment for as much of the work performed as possible.
- Work closely with Vocational Rehabilitation staff to focus on more creative positive outcomes.
- Use foundation money creatively for customized employment funding.
- Learn more about the concepts of "braided funding."
- Move one FTE from the workshop to community employment services every four months.
- Evolve from a traditional VR assessment question of whether people are employable to a "yes, they are," person centered, discovery based, process.
- Think strategically and constant staff training because the employment world is ever changing.

Appendix 5

Strategies to Address Barriers to Employment for Individuals with Disabilities

This Appendix contains examples of strategies that support the expansion of competitive employment outcomes, including the use of customized employment, by CRPs. The examples are taken directly from the experiences of the T-TAP mentor agencies. In each of the following examples, a barrier to competitive employment is defined; a strategy to address that barrier is described; and a specific application experience by the mentor agency utilizing the strategy is presented.

Example 1: Arc of Stanly County

Individual Barrier to Competitive Employment

Many people who might be employed face multiple challenges in finding competitive employment. Typically, for people with significant disabilities, there is not just one barrier to employment. Negative behaviors are a prime barrier to overcome. A second barrier may be parental refusal to allow an adult family member to work in a specific job or place. People with severe disabilities often cannot be interviewed in traditional manners, and may present a negative first impression on interview, so even with parental permission, a person may not be able to present him/herself in a manner that is acceptable to an employer. For employers who already have a bias against people with disabilities, it is difficult to convince the employer to hire a person with negative behaviors, who is not independent in all self care tasks, and who cannot follow worksite rules independently. In addition, it if often difficult to withdraw a coach from an individual with significant needs, as creating natural supports is difficult due to employees' attempts to distance themselves from someone with acting out behaviors.

Strategy to Address Barrier

Creative Persistence - When multiple barriers to competitive employment exist for an individual, the barriers must be managed not only as individual barriers, but also as a combination of barriers. Staff must perceive barriers as fun challenges rather than negative problems to be overcome. With creativity and persistence, barriers for people with severe disabilities can be overcome. In this situation, the barriers listed above were addressed through job carving, natural low technology cues, creating-buy in from employees, using built in reinforcers, educating the current employees and providing intensive training that capitalizes on relationships, and educating family members other than the primary caregiver. Finally, the barriers were also addressed because staff supported the consumer's dreams, rather than using the realities that they believed existed for the consumer.

Case Example of Individual Change Strategy

Leslie is a man who has significant disabilities. He is autistic, severely retarded, and is unable to maintain eye contact. Instead, he maintains a silly grin, giggles,

and rolls his eyes when addressed. He rarely speaks, and when he does, it is often to parrot the last sentence said by another person. Instead, he frequently makes weird noises. Leslie touches people all of the time in an effort to communicate, but often pushes people hard on their shoulder. If Leslie does not know you, he is likely to sneak up behind you and put his hand roughly on your shoulder. Leslie is a diabetic who does not control his food intake and forgets to take his medications.

Leslie was employed at a university as a dishwasher in an enclave with staff supervision over ten years ago. The university determined that it no longer needed the enclave, so the job ended. For the past ten years, staff worked with Leslie to attempt to find him appropriate competitive employment. Nothing worked. Leslie was determined that he would work again at the university, and no amount of reason or coaxing could deter him from his goal. His mother agreed that this was the goal. Over the ten year period in discussion, the university was approached several times, but each time the answer was a resounding "NO!"

When it became apparent that staff were spinning wheels trying to talk Leslie into another job, it was determined that the barriers existing that prevented Leslie from working at the university as a dishwasher must be overcome. Staff determined that persistence and creativity would be used as strategies to overcome the barriers. It took them six months, and lots of persistence and creativity.

Staff began by taking Leslie to the workplace to check on his application. This was the wrong approach, as this person who sounded and acted so differently immediately turned off people. So the strategy changed. Instead of taking Leslie with her, the job coach began checking back on the application frequently by herself. She established a relationship with the new dietary manager, who explained that he had had a previous bad experience hiring a person with a disability. He continually told the job coach that he didn't need any more employees. The job coach helped the dietary manager identify the university's needs, and explained the concept of job carving. She had to convince the dietary manager through positive approaches and persistence that job carving was in the best interests of the university. Eventually, perhaps only to get rid of the pesky job coach, the dietary manager agreed to meet Leslie and have an interview. Staff knew that a traditional interview would not work, so the job coach was able to persuade the employer to do a skills based interview.

Leslie came into the kitchen, put on an apron, and proceeded to empty the dishwasher and put dishes away. He had remembered for ten years where each dish and utensil was stored. The manager was impressed, and agreed to try him if the other issues could be resolved.

Mother was a second barrier. She did not want her son working in a public place without staff where he might be harmed. Instead of continuing to work with mother, staff approached sister, and convinced sister that this was the best approach. Sister and job coach together were able to persuade mother that she should let Leslie try the job. Educating family members other than the primary caregiver can often help persuade a caregiver to allow the individual a chance.

Inappropriate workplace behaviors were a barrier to overcome. Leslie was in a kitchen, and likely to eat whatever he saw. He had to take medications at a certain time. He was unable to tell time. In addition, Leslie would not follow work rules. He did not want to take a break. However, if required to take a break, he would sit for the rest of the day. Staff were concerned that Leslie would roughly touch everyone at the worksite, and that employees would not accept him and his behaviors.

Fortunately for Leslie, there were staff still working in the University kitchen who had known him ten years previously, and were not afraid of him, nor were they concerned about working with him. The job coach capitalized on these existing relationships. The job coach educated the current employees and provided intensive training as to what to expect from Leslie and why. Together the job coach and dietary employees brainstormed ways in which Leslie could be successful without the job coach, using current employees as natural supports.

First, they tackled the issue of Leslie stopping at break time and never returning to work. Leslie wore two watches, each with an alarm. One watch is set to when break begins, and the other watch is set to when break ends. With these natural low technology cues, Leslie is able to take breaks appropriately. He also knows that when his alarm goes off the first time he is to take medications. Employees also know this is the time for medications, so prompt Leslie at that time to take his medications. Leslie also needed regular eye contact to keep working. He didn't need anyone to talk to him, but just to look at him. As helping Leslie was a group project that the employees had bought into, employees trained themselves to look at him at least every 30 minutes. In this way, Leslie was able to continue working without prompts. Leslie also ate everything he wanted, not sticking to his diet. Employees who eat lunch with him remind him about what he can and cannot eat, another natural support.

Like many people, Leslie needed reinforcement to continue to work, even though he enjoyed his work. The employees determined that Leslie most enjoyed breaking down the boxes that the employees had emptied on any given day. This became a regular end of the day task, and acts as a built in reinforcer for Leslie. No one has to reinforce him; the task reinforces him.

Staff was concerned about Leslie's touching behavior. The job coach explained to Leslie that if he were to have his heart's desire, the dishwashing job at the university, he could not communicate with students or other people coming to the cafeteria by roughly touching them. Leslie was so happy in his job and his relationships with co-work-

ers, that he was able to control his impulse, and has only touched someone once. Leslie is happy, which is a key to controlling his negative behaviors. He is working at a full commensurate wage for his position at the University.

Example 2: Career Designs and Development Services (a divisio of Dallas Metrocare Services)

Individual Barrier to Competitive Employment

Individual diagnosed with mental retardation, very limited verbal skills, lack of appropriate social skills (shy & introverted), lack of paid work experience, low self esteem, deaf in one ear, mild cataracts, history of seizures, and a heart murmur.

Strategy to Address Barrier

Utilized marketing and networking abilities of employment consultant to make contact with local business - a library. Capitalized on individual's past volunteer experience working in library. Searched for an employment setting in which the individual's lack of verbal communication and social skills were not impediments to his job functioning. Capitalized on individual's personal strength - his memory and strong support from group home (as well as mother) for individual to remain proactive in job search and assist with transportation issue. Employer had previous experience working with persons with disabilities.

Case Example of Individual Change Strategy

Employment consultant knew of individuals past volunteering experience at a library. The consultant arranged a meeting with a local library's Human Resource department and advocated on the individual's behalf, focusing on his personal strengths, including his knowledge of the library system. The employment consultant arranged with the group home to provide transportation services for the individual to get to and from the work site. The individual's family was very proactive and supportive of fostering independence in the individual. The consultant made arrangements with library staff to learn the aspects of the assigned job and assisted the consumer in making the transition into employment.

Example 3: Career Support Systems, Inc.

Individual Barrier to Competitive Employment

Mr. H. was referred to Career Support Systems, Inc. with a diagnosis of mental retardation and depression/anxiety disorder. He also had a history of substance abuse. His work history consisted of 6 months of employment on a supported employment group-option landscaping crew. He and his Vocational Rehabilitation Counselor worked together with our staff to establish an employment goal of competitive employment in the janitorial /custodial field. In addition to the barriers created by his disability(s), Mr. H. had the following additional barriers:

- No H.S. diploma
- No transportation
- Very limited work experience (6 months on Group Option-Enclave)
- Very rural community with a limited # of businesses and high unemployment

Strategy to Address Barrier

Job carving/job restructuring - Since Mr. H. lived in a very rural area and had no access to transportation, his Employment Consultant knew that his options for finding work close to his home would be limited. There was a nursing home within walking distance of Mr. H.'s house, so she targeted this employer for contact. The Employment Consultant called on this organization to assess the work environment and to identify any opportunities that might exist. While the nursing home did not have any positions open, his Employment Consultant was able to identify a potential opportunity to utilize job carving and restructuring to create a position.

The assigned Employment Consultant noticed during her tour of the facility that in addition to their nursing duties, the Nursing staff also performed general janitorial services for the facility. Upon further investigation she learned that there was no janitorial staff employed at the facility. She then set up a meeting with the facility's Administrator and discussed the potential for creating /carving a janitorial job for Mr. H.

After interviewing several staff members about their duties, she prepared a sample job and then prepared a job analysis of the cleaning duties performed by the nursing staff. A formal "Employment Proposal" was developed with, and on behalf of, Mr. H. that ultimately led to the creation of his PT Janitorial /Custodial position. The proposal addressed the following topics:

- Rationale: Allowed nursing staff to dedicate more time to core service (patient care).
- Benefits: Time and money saved by reassigning duties to a worker with a lower wage
- Qualifications: Outline of Mr. H's strengths, abilities and desired outcome.
- Employment Conditions: Details such as hours, wages, and work place supports provided.
- Work Opportunities Tax Credit: Described potential for additional cost savings
- References: Three references were provided
- Approval Signatures: signed by Mr. H.; his Employment Consultant; & Nursing Home

Example 4: Cobb/Douglas Counties Community Services Board

Individual Barrier to Competitive Employment

The participant had been attending a traditional day program for ten years that focused on her having a dual label of mental retardation and mental illness. Her day consisted of repetitive daily living skills training. The day staff supporting her did not have the time to discover her unique strengths, gifts, and talents within this traditional model. It was difficult for her family and those around her to visualize her working in the community. As a result of these beliefs, there was a sense of learned helplessness from the participant.

Strategy to Address Barrier

The participant was identified as a candidate for competitive employment through staff interactions with her and her family. A strong focus was placed on getting folks into the community through employment. Staff was asked to work with the folks and their families to identify individuals who would like to get out of the facility and into community placements. The strategy was to begin with willing individuals and their families in hopes that their successes would encourage those who were more resistant to the changes to open up.

With the person's input, orchestrated a Circle of Support to learn about the person's unique skills, talents and strengths and to begin envisioning a job in the community. The participant spent time outside the day program doing things she liked so that staff could learn about her in different environments other than a day program.

Created a Vocational Profile to determine the kind of job she would love to do that took into account her desire to dress-up, have a computer and work with other professionals.

Case Example of Individual Change Strategy

The Employment Consultant spent time in several companies simply observing the social climate because the Circle of Support and the Vocational Profile illustrated the need for the participant to have a work setting that was calm, upscale and flexible. It was also important for her to wear professional attire, and carry a briefcase.
A company was identified, Deloitte Consulting, that met these specific requirements. While the participant could not meet all the duties required in the company's various job descriptions, she could meet some of them with job coach and co-worker support. A position was negotiated with input from Deloitte's Human Resource, Administration and Senior Management staff. The company is located in a corporate office high-rise in downtown Atlanta. The job duties involve carved-out, simple data-entry, office supplies distribution and conference room scheduling.
The company provided a lap top computer, 15 hours a week of part-time employment, help with transportation, and co-worker support. All the conditions of employment were negotiated prior to job acceptance.

Example 5: HPS, Helping People Succeed, Inc.

Individual Barrier to Competitive Employment

n most cases, individuals who have significant disabilities do not have any measurable or actual experience in the job market. In addition, most individuals who have significant disabilities do not have high school diplomas or skills training that translates to the competitive work force.

Strategy to Address Barrier

Developing strategies to market the individual's ability, potential and worth can be accomplished by:

- Developing functional resumes that present the person's abilities in a quantifiable format.
- Developing relationships with Cambers of Commerce, civic clubs and business groups to develop a trust and dependence on the organization.
- Assisting business with job carving and restructuring so that jobs can be created/customized for individuals who have a disability.

Case Example of Individual Change Strategy

A law firm called to see if we had a person who could do microfilming. The staff identified Ruth as the perfect candidate. Ruth grew up in an institution, spent many years in our sheltered workshop, had no education, and had significant mobility issues that caused her to use a walker. She was also beginning to become a behavior problem at the workshop because she wanted a job.
The microfilming position has a number of related tasks including alphabetizing, record retention, and copying and delivering copies between departments. The job coach worked to reorganize the job. Primarily high school students who paid little attention to detail had performed the microfilming, and one actually disclosed information to another high school student regarding their parent's divorce settlement.

A scooter was purchased through Vocational Rehabilitation so that Ruth could maneuver in the workplace at a faster pace; a "back scratcher" was purchased to turn the light off and on; and the parts of the job that required reading, copying or delivering were assigned to other positions. Ruth became their head microfilmer — not reading was a plus, not a problem. Files were kept in perfect order and she became a valued part of the law firm. She shared in all of the fringe benefits of the firm including profit sharing. She was included in luncheons and parties, and she purchased her own home with a roommate with the assistance of the firm's real estate section.

Not only is Ruth a valued employee - The law firm is now one of our strongest supporters and they encourage employers through out our catchment area to consider employing someone with a significant disability for all of the right reasons.

Example 6: KFI, Inc.

Individual Barrier to Competitive Employment

While rural sections of Maine have not enjoyed the recent extremely low unemployment rates of other sections of the country, KFI remains committed to assisting people with disabilities find regular jobs for minimum wage or greater. Although jobs continue to be hard to find for everyone and people with disabilities experience the greatest difficulties of all, the approaches we use are successful without resorting to a Section 14c certificate – in fact, we simply refuse to use this certificate and do not offer sub minimum wage as an option to employers. We believe that our success in this tough job market and in isolated locations means these strategies can work anywhere. We recognize that there is a dual dilemma for job developers: they both assist businesses in identifying and then solving their problems and also assist people with disabilities to discover their interests and then find a good job match.
Strategy to Address Barrier

- Learn about the individual - what the person has done, likes and dislikes, the type of surrounding that is acceptable or a problem, why any failures occurred, what hours are acceptable, transportation arrangements, etc.
- Only place people in jobs they want. If they do not know what they want, help them explore options through job shadowing or situational assessments.
- Learn about the business and help the employer discover and then solve problems. (We estimate that 75% of successful placements happen in businesses that initially said they have no openings.)
- Develop a relationship with the employer by not overselling, by handling problems when they occur, and by being honest.
- Have an understanding of incentives that are available to employers (e.g., trial work experience, tax incentives, etc.)
- Follow-up - find problems before they happen or while they are small.

Case Example of Individual Change Strategy

Brian had no previous work experience and was taking medication that made him drowsy. The job developer spent some time getting to know him and his interests and helped have his medication checked and changed, increasing his energy. The job developer recognized that transportation would be an issue and worked out various arrangements with estranged family members to get him to the job, but the job search began with businesses close to his home. Because of the significance

of his disability, he needs a job coach, but the coach only provides transportation in emergencies.

Brian eventually thought he would like to work at the local grocery store, and a Trial Work Experience (TWE) was arranged with the employer. The TWE allows the individual to receive a commensurate wage – minimum wage or higher – for the approximately 3 to 4 weeks. Maine's Bureau of Vocational Rehabilitation pays the TWE wages to KFI, which in turn pays Brian, so the employer has no expenses during this period. The Bureau also pays for a job coach. While there is no guarantee of employment after the completion of the TWE, we estimate that the person is hired about 80% of the time.

Prior to Brian's first day at work, our employment team spent many hours going over potential scenarios and emphasizing the importance of the social aspects of working. Brian is working for four different departments during the TWE in order to maximize his chances for on- going employment at the end of this period. KFI has an established relationship with this employer. He has hired several people over the years, but not all the work experiences have been successful. One of the reasons for the solid relationship is our willingness to handle unsuccessful situations and leave with a handshake whenever a job ends.

On the importance of knowing the person: our job developer says he would like to do a presentation consisting of the following: "Ask the person what he/she wants and then go find it. Thank you, that is the end of this presentation."

Example 7: Rise, Incorporated

Individual Barrier to Competitive Employment

Statistically speaking, the odds are stacked against finding a job in the competitive labor market when an individual has significant and complex disabilities. For example, consider this case of a secondary education student who uses a wheelchair and has cerebral palsy, a visual disability, and a learning disability. These disabilities have resulted in significant functional limitations involving this young man's mobility, self-dependency skills (he requires feeding, dressing, and toileting assistance), speech communications, learning style, and capacities to perform many motor tasks requiring finger and hand dexterity. Due to his disabilities and the powerful imagery associated with his functional limitations, this young man's secondary education staff and family members held very low expectations for any employment success beyond the structure of a center-based, community rehabilitation program.

Strategy to Address Barrier

The secondary education program chose to become a collaborator in a newly launched and progressive school-to-work transition program. The primary objective of this program was to obtain customized competitive employment for ALL secondary education students, regardless of the significance or complexities of their disabilities. The functional limitations imposed by this student's disabilities were viewed simply as barriers to be planned around by its project staff. A person-centered career planning procedure was initiated to support the student and his family members in identifying job interests and talents that could be potentially marketed to community employers. All of the possibilities were explored with the support of his interagency career planning team. Using a problem-solving model, the team also identified, examined, and offered potential solutions to all known obstacles to community-based employment.

Case Example of Individual Change Strategy

Use of Assistive Technology and Job Carving/ Creation -- The employment specialist assigned to work with this student recommended and secured the technical services of a rehabilitation engineer to assist in the use of assistive technology should a suitable employment position be found. Capitalizing on the student's known interests in music, the employment specialist canvassed opportunities with Best Buy, an electronics retail superstore. The employment specialist observed a store clerk performing an activity that she thought this student might be able to do with a suitable technology application (placing security tabs on compact disks). The employment specialist approached the store manager about the idea of a job carving/creation strategy for the student. The manager expressed an interest in exploring job opportunities and agreed to work with the rehabilitation engineer to explore potential assistive technology applications.

After working on a design with the employer, a low-tech job fixture was designed with a drop so the student could perform the CD labeling function. The student was paid an hourly competitive wage for the tasks performed. The school district agreed to provide transportation to the job and a paraprofessional was assigned to support the student with his personal care needs. A supported employment provider was recruited to assist in the transition of work support from the secondary education program to adult habilitation services. This young man continued to work successfully in Minnesota as a valued Best Buy employee until one of his parents was transferred to another state. Interestingly, the Best Buy store in Minnesota consulted with a Best Buy retailer in the community where the young man was moving about his employment arrangement. And the supported employment provider in Minnesota consulted with a similar agency in the new community about his job supports. The young man with complex disabilities was successfully transferred, along with his competitive job, to the same national retailer in another state!

Example 8: Via of Leigh Valley

Individual Barrier to Competitive Employment

An individual with a high school education was deemed by the professionals in charge of his care to be appropriate for placement in Via's sheltered workshop. Instead of focusing on his strengths and abilities, the emphasis was placed on his disabilities of autism, mental retardation, and deafness. It was difficult for people to imagine a man who communicated through sign language, had difficulty with impulse control, and could not "function" outside his routine as "employable."
Strategy to Address Barrier

- A circle of support was created for this individual, focusing on his expressions of dreams and an evaluation of his competencies.
- A variety of community-based vocational assessment opportunities were presented.
- Partnerships were formed among his family and other supports in his life to dream about the 'perfect job' and "what works" for him.
- A job development plan was created to focus on the type of work, environment, and co-workers that would provide the best opportunity for his individual success and productivity.

Case Example of Individual Change Strategy

The individual spent time in several companies trying a variety of jobs. These experiences gave insights into what type of work was enjoyable, done well, and provided a sense of fulfillment for the individual. He enjoyed jobs that required an eye for detail, allowed for little deviation from routine, and involved a challenging task. A local company that produced fine guitars fit this description perfectly. The individual was offered a part-time position in the string-winding department. Not only did he excel in this fast-paced atmosphere doing precise work, but he also quickly learned to operate two string-winding machines simultaneously. The company was able to provide him with a challenging, yet routine position that focused on his strengths, interests, and abilities. In the process, he enjoyed a good paying job with friendly coworkers and the best holiday parties and summer picnics you can imagine.

Appendix 6

T-TAP Fact Sheets

Customized Employment Q and A -- by: Michael Callahan

Employment Negotiations -- by: Pam Targett and Katherine Inge

Disclosure -- by: Pam Targett and Katherine Inge

Supporting Community Employment as an Employment Outcome by: Katherine Inge and Pam Targett

Demystifying Customized Employment for Individuals with Significant DIsabilities -- by: Katherine Inge

Employment Supports for Individuals with Severe Mental Illness by: Grant Revell

Addressing Parental Concerns -- by: Katherine Inge and Pam Targett

Workplace Supports -- by: Pam Targett and Katherine Inge

Assistive Technology as a Workplace Support -- by: Katherine Inge and Pam Targett

Customized Employment Q and A: Funding Consumer-Directed Employment Outcomes -- by: Grant Revell

Creating a Diversified Funding Base -- by: John Butterworth, Claire Ghiloni, Grant Revell, and Nancy Brooks-Lane

Developing Collaborative Community Partnerships -- by: Grant Revell and Nancy Brooks-Lane

Successful Organizational Change -- by: John Butterworth and Sheila Fesko

Developing a Business Plan for Organizational Change -- by: Suzanne Hutcheson and Grant Revell

Changing Staff Roles -- by: Katherine Inge, Pam Targett, and Grant Revell

Staff Development -- by: Cecilia Gandolfo, John Butterworth, Don Lavin, and Lance Elwood

Funding of Community-Integrated Employment Outcomes -- Nancy Brooks-Lane and Grant Revell

Addressing Concerns Related to Losing Social Security and Health Care Options -- Jennifer McDonough

T-TAP

Training and Technical Assistance for Providers

Office of Disability Employment Policy (ODEP) July, 2005

Customized Employment: Questions & Answers

What is Customized Employment?

Customized Employment is a process for individualizing the employment relationship between a job seeker or an employee and an employer that meet the needs of both. It is based on a match between the unique strengths, needs, and interests of the job candidate with a disability, and the identified business needs of the employer or the self-employment business chosen by the candidate. This is a business deal.

Is Customized Employment real employment?

Yes-Customized employment is real work. It is based on identifying tasks that an employer needs done to effectively conduct business and matching those to the job candidate's abilities and interests. The 21st Century workplace can't be thought of in the same terms as the preceding century. The emerging global economy is creating jobs that can't be accomplished under the old 9 to 5 model or don't necessarily need to be performed in the workplace. Further, workers are demanding more autonomy, more freedom, and more customization of the terms and conditions of their employment. The work world is changing to merge the demands of the new workplace and the needs of the workforce. One approach that has emerged is customized employment.

What is the Customized Employment process?

Customized employment starts with the development of an employment plan based on an individualized determination of the strengths, needs and interests of the job candidate with a disability. Once the candidate's goals are established, one or more potential employers are identified.

A preliminary proposal for presentation to the employer is developed. The proposal is presented to an employer who agrees to negotiate an individualized job that meets the employment needs of the applicant and real business needs of the employer. Participation in this process by an employer is always voluntary. If the individual has chosen self-employment, the job description would be for the role he or she would play in the business, based on a review of job descriptions of persons already doing that job or similar work, if available. A personal agent or a job developer usually develops the plan, assists the job candidate throughout the process and provides follow up services when appropriate.

How does the personal agent or job developer determine the needs of the individual?

Conducting an individualized assessment involves listening to the person with a disability describe his/her experiences, interests and abilities. Through understanding the person, the job developer can determine potential employment goals. For example, Mr. X dreams about working in the medical field like most of his relatives. They wear white coats and Mr. X wants to wear one also. A job in a hospital transporting patients might be appropriate. The individual assessment will lead to the identification of a set of tasks the person can perform that are the raw materials of a

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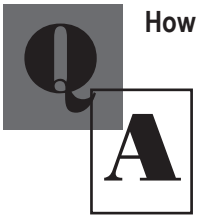
customized job description. The tasks, and employer research performed by the job developer, become the basis for developing a proposal to be presented in negotiations with an employer. The applicant must agree with the terms of the proposal.



How do you identify potential employers?

Potential employers can be identified by looking for a match between the job candidate's interests and skills and the nature of an employer's business. The person with a disability should be asked about employers he/she knows and those family, friends and neighbors know. Other employers can be identified through the business section of the local paper, local business associations or through community knowledge of the job developer. The initial survey of potential employers should be broad and include employers who might have one or more of the proposed tasks performed or needed in their business or who might have a suitable environment for the candidate.

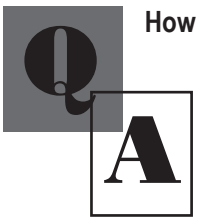
What is involved in voluntary negotiations?

Once an employer has agreed to discuss an individualized job description for the candidate, the agent or developer will present the job proposal. The job proposal must include a task or tasks that the employer recognizes as adding value to his or her business. The employer may accept the proposal, discuss modifications to it, or reject it. If the original proposal is not accepted, a discussion with the employer may result in a different job description that is satisfactory to both the employer and the applicant. If no agreement can be reached, the agent or job developer should consider approaching other employers. Negotiation strategies may include job carving, self-employment, or other job development or restructuring strategies. Customized employment assumes the provision of reasonable accommodations and supports necessary for the individual to perform the functions of the negotiated job.

What is a customized job?

A customized job is a set of tasks that differ from the employer's standard job descriptions but are based on tasks that are found within that workplace. A customized proposal unties the tasks that exist in a workplace and makes them available to be rearranged in a customized job description. For example, the customized job may include only a subset of the tasks from one of the employer's job descriptions or a mix of tasks taken from several existing job descriptions. It may include new tasks that are not currently being performed but that fill a need for the employer. The customizing process often causes the employer to think of existing tasks in a new way.

For self-employment, the customized job is based on tasks to be performed by the individual in the business, including any accommodations or disability-related assistance they may need.



How are customized job descriptions developed?

There are several ways to customize a job description:

1. Carving a job. Creation of a job description based on tasks derived from a single traditional job in an employment setting. The carved job description contains one or more, but not all, of the tasks from the original job description.

   Example: The individual assessment showed that the individual has skills to do filing and he has a strong desire to be a police officer. To meet both the individual's needs and employer's needs a carved job was negotiated within a county sheriff's department that incorporates tasks of organizing and filing misdemeanor arrest reports and traffic citations.

2. Negotiated job description. A negotiated job description is one in which all the tasks of the work setting (tasks contained in more then one job description) are available for selection to form a new, individualized job description.

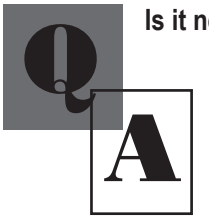
   Example: After working in a crew doing evening janitorial work, a worker told his crew director that he wanted a job where he could wear nice clothes, didn't have to clean after other people, and could work around other people. He liked people but never got to see them in his current

job. A job working in a department store was negotiated for the individual that combined duties from several departments. Only one part of the job involves maintenance and support activities. Additional duties involve helping the advertising department put up and take down the huge number of weekly ads, helping the furniture department manager rearrange the furniture department, uncrating merchandise in the electronics department and loading merchandise in cars for people at the stock room pick up.

3. Created job description. A created job description is negotiated from unmet needs in the employer's workplace. This leads to a new job description based on unmet needs of the employment setting or based on the self-employment business chosen by the individual.

   Example: An individual who is a wheelchair user enjoys people and wants to perform delivery tasks. A branch office manager of an insurance company was receiving frequent complaints that faxes were not being delivered to agents in a timely manner by the fax room clerk. Agents needed the faxes pulled from the fax machine and hand delivered promptly. The job description for the clerk in the fax room involved copying, mailroom responsibilities, and handling the fax machine. Carrying out those responsibilities did not leave time to hand deliver the faxes. The individual was able to meet this genuine employer need through a created job description for delivering the faxes.

   Example: A college was having problems with the vending company that serviced its coffee machines. The coffee cups would turn upside down and the coffee would go into the drain. The vendor removed the machines, resulting in complaints from students about the lack of coffee and cookie sales cart.



Is it necessary to reveal the individual's disability during negotiations?

It is helpful, but not essential, since one of the main ingredients in customized employment is negotiation. Voluntary disclosure, authorized by the job candidate, allows the employer to understand why the job developer may want to customize a job description on behalf of an individual. The disclosure must be a voluntarily act by the job candidate, who must give clear authority to disclose the disability during the negotiations with employers. The permission should be in writing. This guidance is limited to the implementation of customized employment strategies.

Information for this FAQ sheet came from: T-TAP (Training and Technical Assistance for Providers)

Contributors for this issue include: Michael Callahan, Marc Gold & Associates

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For more information on T-TAP, please visit: http://www.t-tap.org

Information for this FAQ sheet came from T-TAP: Training and Technical Assistance For Providers; Michael Callahan, Marc Gold and Associates; and the Office of Disability Employment Policy (ODEP). For additional information, you may contact ODEP at (202) 693-7880 or T-TAP, kinge@atlas.vcu.edu or (804) 828-1851.

T-TAP
Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

April, 2005

Q & A on Customized Employment: Employment Negotiations

While there is no magic formula for negotiating customized employment positions, there are some basic principles and strategies on how to negotiate. The job seeker may negotiate with employers, or a support person such as an employment specialist or job developer can represent the individual. When a seasoned job developer or employment specialist is asked if negotiating employment is more of an "art than science", the reply most likely will be "it is both an art and a science." Implementing strategies, such as the ones presented in this fact sheet, can lead to an employment relationship that mutually benefits both the job seeker with a disability and the employer who needs an employee.

Q **What does negotiation mean?**

A Some people think that negotiation means persuading other people to accept their point of view. For example, when someone haggles with a car salesperson and obtains the best deal, we might say, "Gee, she's a great negotiator." However, negotiation is not about using intimidation, getting your own way, or giving in. That is what happens when people fail to negotiate. One definition of negotiation is to discuss with the goal of finding a mutually acceptable agreement. The goal of customized employment negotiations is "real work" for competitive wages in a community business.

Negotiations with employers to identify a job of choice for an individual with disabilities might include a number of different approaches. A negotiator, such as the job developer or employment specialist, might work with an employer to create a new position through job restructuring that matches the job seeker's interests and abilities. Another negotiation strategy might involve making changes to various aspects of existing jobs, such as allowing an employee to work different schedules or change the way a job duty is performed. This also could include discussing the need for accommodations and other workplace supports. Employment negotiations may require compromise from those involved (i.e. the job seeker and employer) but results in a win-win situation for both.

Q **What are some of the basic skills needed for successful negotiations?**

A Negotiation is a sophisticated form of communication. Therefore, job seekers or the agency staff who support them need to be able to speak in a clear and concise manner. Knowing the job seeker's abilities as well as the supports that the agency has to offer businesses, anticipating an employer's potential needs and questions in advance, and using marketing tools (i.e. brochure, educational materials, calling card) will be key to successful negotiations.

As soon as two people meet, a relationship begins to develop. Many meanings can come from a sentence just by emphasizing other words. Changes in your voice can also give clues. If the speaker is trying to hide fear or anger, their voice may sound higher or louder, and the rate of talking will be faster than normal. Sadness will produce the opposite vocal pattern, quieter, low-pitched speech delivered at a slower rate.

Negotiations require good listening skills. When meeting with an employer focus on what the other person is saying. Turn off thatinner voice that may be planning the next question rather than attending to what is being said.

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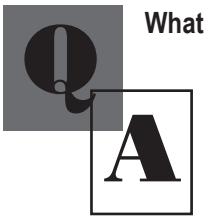
When a person puts his or her whole attention on listening, he lhe or she is less likely to miss important nonverbal messages such as facial expressions and voice inflections that provide valuable cues.

Checking what has been heard may also prove useful. For example, ask, "I understood you to say…am I correct in this?" or "I hear you saying…Is that how you feel?" This type of active listening encourages understanding. It also assures the other person that he or she is heard, accepted, and respected. The ability to actively listen supports open, ongoing, negotiations.

Verbal messages contribute to the tone of the relationship, but many climate-shaping messages are non-verbal. Nonverbal communication reveals attitudes and feelings. It consists of messages sent by the distance between negotiators, touch, body posture and orientation, expressions of the face and eyes, movement, vocal characteristics, clothing, and physical environment. Interpreting non-verbal messages plays an important role in reading an employer's point of view.

Employment specialists should consider the messages that they are sending through their body language. For example, sitting up straight and leaning slightly toward the person speaking shows confidence and interest. The eyes communicate another message. When someone glances toward us with the proper facial expression, a clear message of interest is sent. At the same time, when eye contact is avoided disinterest may be communicated.



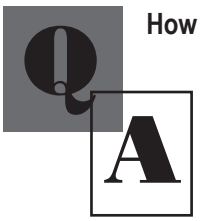
What is the best way to negotiate?

While there is no one "best" way to negotiate, there are some basic steps that can lead toward successful customized employment negotiations. Step one is to know the goal and stay focused. Remember, the goal is to come to an agreement that is mutually beneficial to both parties (job seeker and the employer).

This means beginning with a clear knowledge of the jobseeker's vocational interests, strengths, expectations, and support needs. If an employment specialist is representing the person with a disability, he or she must know the jobseeker's bottom line. This should include areas in which he or she can or cannot compromise. For instance, the job seeker may have some flexibility in the number of hours worked during the week but will not work on the weekends. Knowing the job seeker will ensure that negotiations move in the right direction from the beginning and that a job of choice for the individual is identified. Compromising on features of a job to satisfy the employer that do not meet the needs of the job seeker will not result in a mutually beneficial employment relationship.

Step two is to identify the employer's needs. Successful negotiations also require understanding the business and its operations. Time must be spent building rapport with the employers, before negotiation is attempted for a specific job seeker. Identify the company's needs and suggest possible work solutions that might resolve these needs.

One thing to remember is to not assume that what is important for one person will be the same for another. For example, one job seeker may be motivated to work for a paycheck while wearing a work uniform motivates another. Or, one employer may be motivated to negotiate a job to save money, while another may have a job task that current employees are not completing. Remember, the end result is a mutually agreed upon job. All sides should leave the negotiation feeling satisfied.

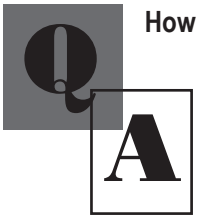


How can the employment specialist determine an employer's needs?

Negotiations require spending time with the employer. During this time, a relationship can be developed and needs identified. The employment specialists should encourage an employer to share thoughts and feelings by asking for feedback on what is discussed. The negotiator's responsibility is to ask questions that will uncover the employer's needs and interests that can then be matched with the needs and interests of the job seeker. If the employment specialist creates a receptive climate, they are more likely to establish a relationship leading to a negotiated position.

Observing business operations and asking key questions may lead to discovering opportunities for customizing a job. For example, some of the following questions may be asked. Do employees have duties that take time away from their main area of expertise? Do you routinely pay overtime or need temporary work services? Are their tasks that do not get done or that you would like to see done more often?

The employment specialist must also be ready to probe below the surface. For example,consider asking questions such as the following: "What's your real need here? What values are important to your company? What's the outcome or result that you want?" The answers to these and other questions can lead to cooperative problem solving. This in turn may trigger discussions about negotiating a new job.

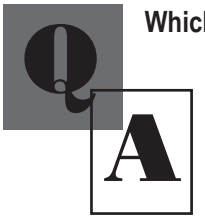


How does an employment specialist convince an employer that customizing a job is a good idea?

The employment specialist must be ready to listen to employers! Listen and keep listening! It's vital to really understand what employers are saying and their points of view. This shows respect and good intentions, and will make an employer feel valued.

In the process, the employment specialist should learn more about a company's needs and what may be holding them back from proceeding with negotiations. "Reading" employers and overcoming objections will be key to success. Employment specialists should become familiar with typical employer concerns and be able to address them. For example, the employer may be wondering, "Will this cost my company money? Will this agency deliver what they are promising? Will the person be able to do the job?"

Pointing out that other businesses have successfully used the service and hired individuals with disabilities may address these concerns. Ask employers who have worked with the agency if their names can be used as references. Discuss in advance with the job seeker the accommodations that will be needed and what information is to be disclosed to the employer. Know how you are going to represent the person's strengths and interests so that the employer does not have questions regarding the individual's ability to do the job that is being negotiated. Be ready and able to describe how the job seeker will be a valued employee to the company.



Which employers should be approached to negotiate customized jobs?

Large, medium, or small businesses can be approached or in other words, any company that matches the individual's abilities and interests identified during the customized employment process. Some employers will be receptive to negotiations and others may not, but this is not necessarily dependent on the size of the company. Those who are not initially receptive may become open if the employment specialist identifies their concerns and is prepared to address them. Regardless of the size of the company, the employment specialist needs to determine who the decision maker is in the company. Who does the hiring? Sometimes, this can be easier to determine in a small company vs. a larger one.

What is an example of an employment negotiation?

Randall is a 28-year-old man who has never worked. Due to the nature of his support needs, he has an employment specialist, Bonita, who will assist him with customizing a job. Bonita began the process by visiting Randall and his family in their home, and she also went with him to the local One-Stop career center. Bonita was able to learn about Randall's abilities, work preferences, and support needs.

For example, Randall has an outgoing, though sometimes boisterous personality; learns new tasks with systematic instruction, prints first name, prepares a simple meal, enjoys folding towels at home, enjoys wrapping items, likes to go bowling, and assists with gardening. Bonita also learned about his work preferences. He enjoys being outdoors, prefers to work between the hours of 9am and 5pm, can work some weekends, dislikes washing and drying dishes, and has trouble tolerating pressure on his finger tips. Bonita also learned about Randall's vocational challenges. For example, Randall gets easily distracted, performs some manual tasks at a slow rate, may act inappropriate to gain attention, needs forewarning of changes in routine, becomes frustrated when unable to complete task and has limited transportation options. This information helped Bonita create a vision of Randall's abilities and possible support needs.

With insight into Randall's vocational abilities and preferences, Bonita set out to customize a job in the community. She met with numerous employers, before identifying one who was interested in discussing their operations in more detail. Mr. Brady, the general manager of a large home improvement store, was interested and arranged for Bonita to meet with his department heads to learn more about the overall operations. During the meeting with the greenhouse manager, Mike Smith, Bonita learned that several

hours a day, in the cold months and more in the summer, were spent watering and repotting plants. Bonita inquired about the possibility of customizing a job that involved watering and repotting plants.

Mike was interested, because this would allow him and his small staff of two to complete other tasks during these hours. This included ordering and stocking inventory, fertilizing and treating the plants for disease or parasites, and waiting on customer. He stated that the person would need to arrive at 7 am and would work until around noon, weekend work would be required, and the pay would be $6.50 an hour.

With this information, Bonita presented the idea to Randall and his family. Although interested, concerns were raised about Randall's ability to lean the job and how his fingertip sensitivity might interfere with potting plants. They also hoped the job could be negotiated further to meet some of his work preferences.

After confirming his interest in pursuing work at the company, Bonita went back to the store to further negotiate Randall's employment. She explained to Mike that the person she had in mind for the job must rely on specialized transportation and may not be able to arrive before 9 am each morning. She also stated that the person would like to have at least a two Sundays off each month to attend family functions.

Mike agreed to one Sunday off a month, with the caveat that the person would work every Saturday. But, he was reluctant to change the starting time to 9 am, because the plants would get dried out. Bonita then asked if the person could arrive to work at 9 am in the cool months (September-April) and arrive earlier in the summer months (April-September). Mike agreed that he was willing to try this schedule. Bonita discussed these negotiations with Randall and his family who agreed and an interview was arranged.

The interview seemed to go very well, however, Mike expressed concerns about Randall's ability to get the job done afterwards. Bonita reiterated the fact that after receiving his new employee training, she would be there to provide additional on the job skills training as needed. She emphasized that her role was to simply complement what the business already did well, and that she would be there to provide or facilitate any additional supports that might needed. Upon remembering this earlier conversation, Mike decided to hire Randall.

This example illustrates a successful employment negotiation that resulted in a customized job for Randall. There was some give and take from each party resulting in a mutually agreed upon employment. Of course, not every employer will be willing to negotiate. If this happens leave a positive impression by ending the negotiations politely, with a thank you, smile, and firm handshake. Then, follow up with a sincere hand written thank you note. This may pave the way for further job negotiations at a later date.

Information for this FAQ sheet came from:	**T-TAP (Training and Technical Assistance for Providers)**
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T-TAP

Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

March, 2005

Q & A on Customized Employment: Disclosure

A key component of customized employment involves negotiating an individualized employment relationship between a job seeker and an employer that meet the needs of both. The process involves identifying tasks that must be completed to conduct business and matching them to the abilities and interests of the job candidate. This will require employers to consider how unmet needs in the workplace can be accomplished in new or different ways than have traditionally ocurred.

Some people with disabilities may be able to negotiate an individualized job description without support. Others may need a representative or employment specialist to assist them in making the proposal. In either case, employers will have questions regarding why a person is asking to customize their job. This may require disclosing the job seeker's disability.

Disclosing a disability may be a major cause of anxiety/concern for people with disabilities and those assisting them when seeking a job. Keep in mind that customization begins with the unique contributions a person brings to the company and not from a charity or disability perspective. Therefore, its very important to consider how an individual will disclose his or her disability, as well as when and what to disclose.

Q **A**

Why should an individual consider disclosing his or her disability?

Access to a workplace accommodation is often dependent on a person's disclosure of disability related needs. Individuals with visible or hidden disabilities who know they will need work-related accommodations, including an individualized job description, should plan to disclose. If an accommodation is needed, the job seeker or their representative should plan how and when to tell potential employers about the disability and be prepared to discuss support needs.

When a personal representative or employment specialist is used, the individual must voluntarily give permission to disclose his or her disability. Obtaining written authorization to disclose and a description of what is to be disclosed is highly recommended. An employment specialist can ensure communication focuses on the person's abilities and the solutions that will allow the individual to successfully complete the work tasks. Unless accompanied by potential solutions, disclosure of a disability can unintentionally lead to exclusion from certain types of jobs and/or employment discrimination.

A person with mental illness may need time during the week for medical appointments that occur on a regular basis. Disclosure of the disability would be appropriate when asking for a flexible 40-hr. work week. The request might include how the individual would be able to perform the essential functions of the job with this accommodation. However, he or she would not need to provide details of the medical diagnosis and treatment such as the type of medication that the person is taking. In this example, if the employee continually asks for time off from work without disclosing, the employer may have a much different attitude towards the individual's performance than if the accommodation request had been made.

Job seekers who have a visible disability may want to discuss their disability with an employer to avoid misunderstanding or labeling or to eliminate unnecessary concern from co-workers. Some people may use disclosure to create an opportunity for educating others about disability and its impact and also provides an opportunity to learn more about the business' disability related services and supports.

Q **A**

Can disclosure help overcome an employer's concerns about hiring a person with a disability?

Although everyone has some limitations, people with visible disabilities often are viewed as incapable of working. This unfortunate conclusion underscores the importance of changing attitudes to recognize that people with disabilities have a vast pool of valuable and important skills. Thus, the question about whether or not and how to disclose a person's disability shifts to educating

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employers, addressing their concerns, and getting them to hire someone who happens to have a disability. This change in thinking minimizes the disability as an issue and focuses on ability.

The word disability is likely to raise concerns for some employers. Under the American's with Disabilities Act (ADA), employers cannot ask about a disability. But, they may inquire about the need for reasonable accommodation to perform essential job functions, if a qualified applicant's disability is disclosed or visible. This may make the employer feel uneasy raising concerns about being sued if the "wrong" thing is said. In such an instance, the employer may spend more time focusing on his or her anxiety related to these unfounded concerns rather than the applicant.

One possible way to address this concern is to be upfront about the nature of the disability. However, simply telling an employer the name of a disability label like traumatic brain injury, cerebral palsy or mental illness is not helpful and may further confuse the employer. Instead of describing a disability in generic terms, communication should focus on what the job seeker does well, functional limitations including strategies for getting around them, and personal life experiences. This can lead to discussions about how a particular job seeker's personal strengths and talents can benefit the employer and open the door to customizing job descriptions.

When a person presents specific strengths and accommodation needs, the fact they are looking for a "good match" via job negotiations may be very understandable to employers. Being able to describe what the person does well hopefully will lead to an immediate job offer. If not, this customized approach might spark ideas about potential job designs that can be pursued elsewhere.

What are the advantages of disclosing one's disability?

There are many positive reasons for disclosing one's disability. If information is initially withheld and later revealed, an employer may feel deceived and misinformed. Also, if the job seeker has a personal representative or employment specialist assisting him or her with negotiating work, employers may have questions as to why this approach is being used. Disclosure also gives the job seeker and his or her representative an opportunity to obtain specific information about the company's employment and HR policies, its operations and existing jobs. This information can be used to determine whether or not the job seeker can qualify for a particular job and an opportunity to think in advance about the accommodations that he or she may need to perform the job. Or, if the person does not qualify for existing work, this will provide ideas on possible ways to create new work opportunities specifically negotiated for the jobseeker.

By considering support needs in advance and having such information in hand during the interview, the job seeker should be better prepared to speak to how the various tasks will be performed with the right workplace supports. This shows the employer how the person can be successfully employed.

What is the best way for the jobseeker's personal representative to discuss disability?

The goal of disclosure is to do so in a way that gains the employer's trust, eliminates concerns, and moves the employment process on to the next steps, such as exploring job possibilities, considering negotiations, interviewing and hiring the applicant. The following points should be kept in mind when preparing to discuss a person's disability with a potential employer. First, the personal representative and the individual who will be disclosing a disability must be clear about the purpose and the desired outcomes of disclosure. This ensures that disclosure occurs with the right person, in a timely and appropriate manner, and with a clear goal in mind. To be effective, the personal representative must be knowledgeable about the job seeker's abilities and familiar with possible accommodations needed in the workplace.

Second, disability information should be related to job performance and presented in a postive way. Avoid labels or clinical descriptions such as bi-polar disorder or traumatic brain injury. This is not helpful information in isolation for an employer. He or she may have pre-conceived ideas about what these disabilities involve. Further, this may negatively impact the employer's openness to negotiating a position. Instead, one might say, "Jack can quickly change his daily routine, if he is told in advance and allowed to write down what changes he needs to make in his schedule."

Sometimes, this approach may not work and an employer may guess the person's disability. This may be a warning sign that signals an employer's fears of not knowing or understanding the nature of the person's ability. When this occurs, it may be best for the personal representative,

with the job seeker's permission, to reveal thier disability. This should be immediately followed by a discussion of the person's positive attributes and how he or she can make a contribution to the workplace. This approach is more likely to yield a better outcome than stating something like "Oh, no I am not allowed to tell you that." An honest upfront approach will go over better than withholding this information, which might raise suspicions and unnecessarily incite concerns.

When speaking about the functional limitations caused by the disability, describe how the person can succeed and perform the job functions with workplace supports, creative work structures, agency services like job site supports or other modifications. For example, "Joan has a job coach who can accompany her to work to provide any additional skills training that extends beyond what you would provide to any other new hire. While learning to perform the job to your standards, the coach will make sure the job is done. Once Joan learns the job, the coach will fade off the jobsite. But will be available for consultation if needed." "Or, Jack works best when he has written instructions that specify any changes to his daily routine."

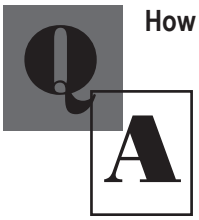
Again, disclosure should always be discussed with the job seeker, and if appropriate his or her guardians, prior to making the first business contact. The job seeker and personal representative should decide what should be said and if applicable who will provide the information to the employer. Whenever possible, the job seeker should take responsibility for making his or her needs known to an employer. This may range from speaking directly about one's needs to simply handing an employer a job proposal during an interview.

Is telling a potential employer that a person has a disability enough information?

Probably just saying that the person has a disability is not enough. Given a lack of information, people imagine the worst. So if you say "person with a disability" there is no telling what the employer is thinking. Therefore, one could argue that the more information that is shared in positive terms, and the more exposure employers have to the abilities of individuals with disabilities, the better chance there is for facilitating a customized job. With this thought in mind, the disclosure question again becomes not if one should disclose a disability, but how does one effectively disclose? The following guidelines may prove useful.

When describing the person you are referring for an interview, take the opportunity to advise the employer about any special needs or the uniqueness of the individual. For example, if the applicant is non-verbal, prepare the employer by suggesting interview questions to which the person will be able to respond. Or, if an applicant most likely will not maintain eye contact with the employer, a comment such as the following may prevent the employer from making negative judgments. "I want to let you know that Joe has never worked and may not appear guarded during the interview. He is quiet when he meets new people. He warms up to others by the second meeting, and once hired he will be able to perform the job."

Employers should also be informed about accommodation needs for the interview. For example, revealing that an employment specialist will accompany the individual who has a cognitive disability to complete the application will better prepare the employer. If the candidate has a unique appearance, discuss a positive way to disclose this information to the employer. "Mary has asked me to share with you that she was in an automobile accident, as a result, she has a large scar across her face. She wants to assure you that this does not impact her vision or ability to perform the essential functions of the position."



How can a creative job search minimize the need to disclosure one's disability?

Ask what is the best way to find a job, and the answer may be to look for and answer advertisements in the newspaper. Or, use the Internet to search for job postings. Or, buy a book on job-hunting at the bookstore. This longstanding traditional approach to job hunting focuses on looking for existing openings and competing with others for them.

This "numbers game" approach to finding a job works on the principle that employers attract a large number of applicants, screen most of them out, interview some, select the best candidate, and offer the person the job. The goal is to screen out applicants who do not look good on paper, have limited employment history or gaps, or lack specific qualifications in reality may not be relevant to getting the job done. This approach to finding employment can work against many individuals and particularly those who have a disability.

Customized employment uses a different approach. Instead of playing the numbers game, a creative job hunt is conducted to locate opportunities to negotiate an individualized job description. The creative approach can minimize one's disability as an issue. Since there is no job at stake, the employer does not measure the person against an ideal job candidate. This allows employers to shift their attention to creative ways to use the person's strengths in a workplace.

Q **A** **How does informational interviewing eliminate the need to disclose a job seeker's disability?**

Informational interviewing involves gathering information about a particular business and its operations. This is a "fact finding mission" of what the company is all about rather than applying for an existing position. If the job seeker is not present, the personal representative can discuss general concerns about unemployment and disability related issues without specific reference to the job seeker that he or she has in mind. That information can come later after the personal representative learns more about the business and its needs. Then, when negotiating the job, the need for possible accommodations (including job site support) may be addressed verbally and within a written proposal.

If the job seeker is participating/conducting the informational interview, then any aspect of the disability can be discussed. Since the agenda relates to information gathering, there is no reason to screen the person from consideration for employment. The jobseeker and/or representative should be prepared to talk about strengths and contributions the person would like to make to the workplace.

Informational interviewing also allows the personal representative and job seeker to learn more about the workplace culture. For example, if the company is innovative, employers may be open to negotiations, whereas companies who are rigid may not be. Or, a workplace with worker friendly policies that may signal that the employer would be more open to negotiate a job and hire someone with a disability. This and other types of important information can be gathered during an informational interview.

Q **A** **What are some closing tips that are related to effective disclosure?**

Be prepared to discuss the specific disability. It may not be necessary, but be prepared. If disclosure is needed be brief, straightforward, and positive. For example, "Tomika has autism. This affects her ability to understand multi-step verbal instructions." State the accommodations or modifications needed to succeed at work. For example, "This means that Tomika will need some extra support to help her become a high-performance employee for your company. If hired, a job coach who has been trained to teach Tomika new skills will accompany her to work and provide on the job skills training." Or, "She does not have a driver's license, but she has access to a transportation service. But, the service only operates between the hours of 10 a.m. and 5 p.m."

Provide examples of successes the person has had in the past when using the supports. For example, "While in school Tomika received on the job training at the Cookie Mart. She received instruction from a job coach and learned how to bake cookies and brownies. Here is a reference from the manager that indicates that she was an exceptional worker." Or, "She is also available on weekends, because she has family members who are willing to provide transportation."

Summary

Finally, be prepared to answer questions about the specific disability. In some instances, it may be helpful to give an employer a fact sheet about general disability information, such as tips for interacting with people with disabilities. The personal representative should always approach disclosing a disability with a positive attitude and focus on the "win-win" situation that will occur if the individual is offered a customized position.

Information for this FAQ sheet came from: T-TAP (Training & Technical Assistance for Providers)

Contributors for this issue include: Pam Targett, T-TAP Training Associate and RRTC Director of Employment Services and Dr. Katherine Inge, T-TAP Director.

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T-TAP

Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

August, 2005

Q & A on Customized Employment:

Supporting Employment as an Employment Outcome

"Whose Job Is It Anyway?" On the surface, this seems to be a simple question, since all Community Rehabilitation Programs (CRPs) want to support individuals with disabilities in their job choices. Service providers must empower their "customers" with disabilities to make informed choices and promote active participation in the decision making process. This fact sheet will provide some answers on how to support individuals with disabilities when they decide if they want to go to work in a community business.

Q **A**

Individuals in our 14 (c) program earn less than minimum wage based on their production and skills. They wouldn't be able to meet the production standards of a job in the community. If the staff ask them if they want to work in the community, wouldn't that be setting them up for failure?

All people regardless of the type or severity of their disabilities have unique talents and gifts to offer their communities. When supports and services are customized, individuals can obtain personal goals and work in the community earning at least minimum wage. The key is to focus on the person's abilities and interests rather than concentrating on his or her disabilities and what he/she cannot do.

Customized employment involves getting to know the person and the skills and talents they bring to a community business. Once these skills, talents, and interests are identified, employers can be approached, and a customized job can be negotiated that benefits the job seeker and the business. Setting a production standard that matches the individual's abilities is part of the negotiation process with an employer.

John was interested in working at an office, making money, and being able to dress in "busi-ness" clothes. A job was negotiated for him by taking job duties from the receptionist that had been interfering with her answering the phone, which was her primary responsibility. She was able to more efficiently perform her essential job function once John took over the work of assembling sales binders. A production standard was set that matched John's abilities, and the employer agreed to this standard during the negotiation process. John earned minimum wage, and he got a job he enjoyed in the community. Negotiating the job based on John's interests and abilities, developing achievable performance standards and providing customized supports and services specific to an individual's needs are key to a successful job outcome.

Q **A**

What are some general guidelines for promoting an individual's involvement in deciding what career to pursue?

Choice may be encouraged in a number of ways. Start by always treating the person as the primary decision maker in the customized employment process. Acknowledge that CRP staff are responsible for facilitating community inclusion for individuals with disabilities. Never focus on the individual's disability; instead, affirm personal assets.

A supportive and meaningful relationship is crucial to success. Take time to develop a helping and trusting relationship with the individual who is interested in customized employment. Learn how to be a facilitator, rather than a provider of services. Assist the person in learning more about his or her personal interests as they relate to the world of work. Be flexible and attend to each individual's unique abilities and support needs. Understand the power of supports and learn some basic facilitation skills and other strategies that can help promote choice. Document the individual's abilities, preferences, and choices so that they can be used to drive the job negotiation process.

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What can I do if family members do not support the person's choice to leave the workshop?

The family who appears over protective may need time and reassurance before seeing the benefits of community employment. They may need guidance and strategies on how to facilitate customized employment outcomes. In these cases, finding out the parents' questions and providing answers will be critical. Pairing families, who have been successful in assisting their sons or daughters in identifying career preferences with families who need guidance or who are unsure, is one successful strategy. What the service provider perceives as resistance may simply mean that parents need to learn more about the benefits of customized employment. A fact sheet on working with parents can be found at: http://www.t-tap.org.

Next, become familiar with person-centered planning strategies that can assist in identifying the individual's dreams and goals for the future. Everyone, with or without a disability, has goals and values central to creating a satisfying life experience. Parents also have dreams and goals for their child. The individual's parents, if they desire, need to be actively involved in the decision making process. Planning and working with the person and those who love and know them best will result in shared goals and action plans that resulting positive vocational outcomes.

How can someone who does not verbally communicate express choice or make decisions about going to work?

Everyone can express choices; however, the way a person with a disability demonstrates may be very different. Consider for example an individual who chooses not to participate in a workshop activity or yells, screams and attempts to run out of the building when instructed to complete a task. Consider another person who does not regularly attend the workshop. Some providers may say that the first person has inappropriate behaviors and is not ready to work. Others may feel that the second person must regularly attend the workshop program in order to demonstrate that he or she wants to work in the community. However, if staff take the time to learn more about the unique styles of expressing choice for both of these individuals, they may discover that the behaviors reflect the person's choices and support needs. Providers must take the time to listen to what people have to say, especially when their communication skills are limited.

For the person who is not able to communicate or does not know what type of job is desired, finding out what is of interest to them is even more critical. This is accomplished by spending time with the person, observing what they do when given the freedom to choose an activity. Interview family members and friends about the person's interests and skills. Provide opportunities for the individual to observe or work briefly in a competitive job site that reflects the person's interests.

One young woman who was unable to express her work preferences really enjoyed spending time in the park watching people with their pets. This information was gathered during interviews with her family and friends. Part of trying to identify a job of choice for her included setting up brief, two-hour experiences at a veterinarian's office and a pet store. It is important to emphasize that these experiences are brief and are not intended to "judge" whether the person is "ready" or able to work in a community job. The experience is designed to provide opportunities so that the individual can express work preferences and choices. Once these are identified, then customized supports to assist the person in being successful in the workplace can be identified and provided.

What if the person is not qualified for the career that he or she chooses?

This is a common question that is asked when providers begin to ask individuals with disabilities about their dreams and goals for work. Think back to when you were asked, "What do you want to do when you grow up?" Typical answers include becoming a doctor, airplane pilot, lawyer, nurse, and so forth. In many instances, your goals and dreams were modified or changed as you gained experiences and have opportunities to experience different career paths. Perhaps, becoming a doctor meant that you wanted to have the prestige and money associated with the profession. But when you discovered the qualifications that were needed, you selected another career that still provided the same rewards as becoming a doctor.

These experiences should not be any different for the individual with a disability. Providers and support people in the lives of individuals with disabilities need to carefully consider the aspects of the career that are perceived as beyond the individual's capabilities. What is the person trying to communicate when he/she says that being an airplane pilot is the job of choice? What interests and abilities does the person

have that can result in a customized job that is reflective of the person's vocational goals? Is the person really trying to say that he wants to work at an airport? Or, is the person trying to say that he likes airplanes but not necessarily flying them? This is when opportunities to observe and be exposed to the career of choice are important. Then, armed with information, the provider can begin to represent the person's vocational goals and negotiate with employers to identify work in the community that can satisfy these goals.

Q **A** **What if the person says he or she wants to stay at the workshop and does not want a job in the community?**

The important question to ask is whether the person is making an informed choice to stay at the workshop. Has the individual had opportunities to participate in community experiences? If the person's only work experience has been in the community rehabilitation program, then perhaps the decision is based on where they are comfortable. Is "fear" of the unknown preventing the person from taking a chance? Does the person associate attending the workshop with friends and fear of losing those friends keep them from leaving? Or, has the person tried a community job and had a bad experience? Was failure based on the provider's inability to successfully customize a job that reflected the person's interests and abilities? Were the workplace supports identified successful? Does the individual need to have more help identifying a job or career of choice?

The emphasis here is to not "blame" the person for not being successful or not wanting to leave the workshop. Rather, the focus is on identifying the person's support needs. One strategy is to lprovide volunteer opportunities in various community settings. Be certain that any volunteer opportunities are consistent with Wage and Hour Guidelines if these are unpaid experiences.

Q **A** **These are all great ideas, but our program is not funded to provide the ser-vices that are described in this fact sheet. Can you give suggestions on how to find staff time needed to get to know the person's interests and abilities?**

Talk with the primary funding agencies about providing support to assist an individual to explore personal employment preferences and options. Individuals who choose jobs that match their interests have a better success rate than those who take any job that is available. Funding agencies that provide support for exploring personal options and interests will save money in the long run through better employment outcome rates. Educate your funding agency on the advantages to a more involved exploratory process.

Another strategy is to involve family members, mentors, friends, and others to identify the person's interests and vocational goals. The employment support person does not need to be present during each experience in the community. Assist the person with a disability in identifying business sites and other places that may be of interest. Work with the support team to facilitate these visits and get feedback on what is learned when the person has an opportunity to participate in new experiences. This information can used when the individual begins to decide what he or she would like to do for a career or job in the community.

Finally, there are multiple funding streams available to individuals with disabilities. Funding should be flexible and be mobile enough to follow an individual. If a person is eligible for the Medicaid Home and Community Based Services Waiver, funding could be redirected into support for community exploration. You might need to work within your program to redirect funding to support these activities or you might need to explore other available options. The point is that even though a CRP has not been funded traditionally to use a person-centered approach, it is important that options be explored. Redirecting funds must be part of an organization development movement towards expanding use of integrated employment outcomes.

Summary

Choice and decision-making are important components of self determined behavior. Without learning or getting support to facilitate these skills, some individuals will never be empowered. Unfortunately, in some instances people with disabilities have had too few opportunities to acquire such skills, have had limited access to experiences to apply them, and/or have been bound to the expectations and perceptions of others about the inabilities of individuals with disabilities. However, the good news is that when given the chance to learn these skills and practice in the course of everyday life, the skills to make informed choices can be acquired.

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T-TAP

Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

June, 2005

Q & A on Customized Employment:

Demystifying Customized Employment for Individuals with Significant Diabilities

A survey conducted by the Institute of Community Inclusion, University of Massachusetts Boston revealed that 70% of the individuals with disabilities served by Community Rehabilitation Programs (CRPs) are people with developmental disabilities. The majority of these individuals are not working in the community. They are in facility-based non-work and work programs including those that pay less than minimum wages through 14 (c) Special Wage Certificates.

There are many reasons that community employment has not been the outcome for individuals with significant disabilities. One reason that is often mentioned is that this group has intensive support needs that can only be provided in specialized settings. Another common belief is that individuals with significant disabilities must learn skills in facility-based programs before moving to competitive positions in community businesses. However, data from the 2004 State of the States in Developmental Disabilities, published by the American Association on Mental Retardation, suggests that there is approximately one person with developmental disabilities working successfully in a competitive job for every three individuals who remain in facility programs. This fact sheet will provide some questions and answers including strategies that CRPs can use to successfully assist their customers in achieving customized jobs of their choice in the community.

Q **A**

The individuals with significant disabilities in my program do not qualify for most of the jobs that are available in the community. Do you have any suggestions on how to find work that they can do?

Sometimes, individuals with significant disabilities are not able to complete all the essential functions of existing job openings. Employment specialists or personal representatives who rely on locating positions by using traditional sources (e.g., classified ads, postings on job boards, Internet sites) may become frustrated and discouraged when they cannot find jobs for their customers. Unfortunately, they may conclude that individuals with significant disabilities are not "qualified" for competitive employment positions.

An approach to finding community jobs for individuals with significant disabilities that has proven to be successful is customized employment. Customized employment begins with an individualized determination of the strengths, needs, and interests of the job candidate with a disability. Support and input can be provided by an employment specialist, family members, and others. Once the individual's job goals are established, potential businesses can be identified by networking with family, friends, and neighbors, contacting local business associations such as the Chamber of Commerce, reading the business section of the local paper, and using knowledge of the local job market. Employers targeted on behalf of the individual should be selected based on a match between the job seeker's expressed interests, skills, and type or nature of work performed at the company. This customized approach allows for the job seeker and the personal representative to negotiate job duties that match the individual's skills. In other words, the approach results in a negotiated position for which the individual with a significant disability is qualified.

Q **A**

How can I convince an employer to hire an individual with a significant disability?

Personal representatives / employment specialists must believe that individuals with significant disabilities can make valuable contributions to businesses. If the employment specialist is convinced that the individual can enhance the company's operations, then he or she will be able represent the job seeker successfully!

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Customizing a job for an individual with significant disabilities requires spending time with employers. The negotiator's responsibility is to ask questions that will uncover the company's needs that employer somtimes does not recognize, which can be matched with the needs and interests of the job seeker. The next step is to develop a proposal for presenting to the employer. The proposal describes the aspects of creating an individualized job that meets the business needs of the company and the employment needs of the applicant. For example, the proposal should include the tasks to be performed, accommodations, as well as the standards for work performance. For individuals with significant disabilities, this means creating a new job description for a position that is tailored to meet the unique skills and abilities of the individual.

The proposal should include a description of an individual's contributions such as how customizing a position can save money and time, get tasks completed that are typically not done or not done often enough, and in general enhance the company's operations. Identifying how the new employee will make a valuable contribution is the key to sealing the business deal.

In my agency, individuals with significant disabilities need constant supervision and prompting to complete the tasks assigned to them. Please explain how an individual with intensive support needs can become independent in a community job?

Many individuals with significant disabilities have never learned to monitor their performance, since staff usually does this for them. In facility-based programs, there may be no need to consider fading staff presence. This can create dependence on the trainer, and individuals with significant disabilities will wait to be prompted. Sometimes, even the physical presence of staff becomes the prompt to work. When they step away from the individual, he or she stops working. What occurs is prompt dependence on the instructor and an inability to be independent of agency staff.

One of the usual requirements of employment is the ability of the worker to perform acquired skills with minimal supervision. The use of systematic training strategies on the job is critical to ensure that individuals with significant disabilities learn their job duties in a reasonable amount of time. This includes guidelines and planning for fading the employment specialist's presence from the job site. Individuals must learn how to monitor their own work performance to be independent of the employment specialist.

Self-management is one way to involve an individual in the learning process and assist him or her in becoming independent of staff prompts and supervision. Self-management techniques may be applied before or after the work task that the individual is trying to monitor. For instance, an individual may use a pre-set alarm on his or her watch to determine when it is time to take a break. Another example may be the person who uses a picture cue book to determine what tasks need to be completed during the day. Remember that the individual will need to learn how to use whatever strategy is selected. Simply giving the materials or explaining the strategy to the individual may not result in an immediate understanding of how to self-manage work performance.

Can you provide an example of how someone with a significant disability learned to monitor his or her work performance without the direct on-going intervention of an employment specialist?

Ronald was hired by the local department store to assist with the general maintenance of one of the floors in the store. This included unpacking new merchandise, hanging it on hangers, and vacuuming. His employment specialist helped him learn his job duties and then faded from the job site. After the employment specialist faded, Ronald began having difficulty remembering where he had vacuumed. The employer called the employment specialist and asked if she could help him do quality control because Ronald often skipped entire departments assigned to him.

The employment specialist observed Ronald's performance and determined that he most likely had become prompt dependent on the employment specialist during the initial training phase. If she walked in front of Ronald, he was able to successfully locate the departments that he needed to vacuum. If she walked behind him or was out of sight, it seemed as if he did not know where to go in the store to vacuum. The employment specialist talked to Ronald, and they decided that a picture book could help.

Together, they took pictures of the various departments that he needed to vacuum (e.g. ladies' shoes, dresses, and cosmetics, etc.). These pictures were copied on a copy machine to form a booklet. Ronald carried the booklet in his pocket and referred to it to complete his task. Once he had finished a specific department, he tore off that picture and threw it in the trash. The top

picture told him where he needed to vacuum next. Ronald continued this strategy until he used all of the pages in his booklet for the day.

The employment specialist helped in the beginning by working with Ronald to learn how to use the book. She was careful to walk behind him and not inadvertently prompt him with her physical presence. This took approximately three days to complete. Next, the employment specialist provided a week's supply of booklets to the employer. Finally, the employer took over the task of copying the pictures as well as making sure that Ronald had his booklet at the beginning of each work shift. The employer also regularly spot checked Ronald's work and provided him positive feedback on a job well done. This strategy was successful in allowing Ronald to independently self-monitor his work performance without the presence of the employment specialist.

Isn't pre-vocational training or training in a facility-based program a pre-requisite to community employment? In other words, wouldn't it be easier for an individual with significant disabilities to learn skills before they are placed in community jobs?

There isn't any data that shows working in a facility-based program is a pre-requisite to community employment. There is research that shows individuals with significant disabilities have difficulty transferring or generalizing skills learned in one environment to another. Agency staff could spend time teaching a work skill such as "staying on task" in the workshop, but the person may not transfer this skill to a work setting. Time would then be needed to train the person to successfully demonstrate skills in the community business that had already been trained in the facility.

Part of the problem of transferring skills also can be related to the difficulty simulating the characteristics of a community business in the facility-based program. This could include the presence or absence of environmental conditions such as noise, amount of space, objects, customers, coworkers, and the demands of community employment. Teaching the individual to work at his or her job site of choice rather than withholding access to the community until skills are learned is the best approach.

Can individuals with challenging behaviors work in the community? Isn't an extended employment program or sheltered workshop better able to meet their support needs?

Yes, individuals with challenging behaviors can work successfully in community jobs! Some individuals may have socially inappropriate behaviors in the facility-based program but be very successful in a competitive job. The first step is to get to know the individual and his/her strengths and characteristics including the activities and tasks that the person likes or shows interest in completing. This information can be used to customize a job in a business environment that matches the individual's preferences and support needs.

This success can be realized by customizing a position that matches the person's strengths and the characteristics of the workplace rather than focusing on "fixing" the person's behavior. The individual who uses profanity might be successful working in construction or a loading dock if that is determined to be a job of interest. Said differently, the individual who talks continually most likely would have difficulty in a position where coworkers are not allowed to talk with each other.

An important point to consider is that individuals with significant disabilities need to learn socially appropriate behaviors in the community! Staff could spend a great deal of time working to eliminate a behavior that has been identified as "inappropriate" or "challenging" at the program site. But, as soon as the person moves to a new workplace, the same behavior or a new one might occur requiring intervention and support. This relates to the difficulty that many individuals with significant disabilities have in generalizing what they learn in one setting to another. The quickest path to success is to learn skills in the setting where the person wants to work rather than requiring him or her to learn them prior to working in a community job.

The individual that I am thinking about usually refuses to do any work. As soon as a staff person prompts him, he tries to sit on the floor and makes loud noises. How could someone like that ever leave a community rehabilitation program?

Staff actually may be "teaching" the behaviors that are limiting the employment outcomes. Is this intentional? Of course, not! The point is to recognize that behaviors are learned whether they are "appropriate" or "inappropriate." In addition, segregated environments sometimes have different standards for what is socially appropriate than community businesses. For instance, individuals may be allowed to

hug staff, take frequent and long breaks, or are not required to work at a steady pace or up to production standards due to their significant disabilities. Inadvertently, opportunities to demonstrate successful work behaviors are limited due to staffs' decreased expectations.

In the case of the young man who is sitting on the floor, consider the function or purpose the behavior is serving for him. Is the he trying to get attention? Perhaps, he has learned staff will interact with him if he sits on the floor. Observation of the individual and what goes on in the environment before, when, and after the behavior occurs can provide some clues on how to support the individual. The goal should be to teach them through positive support strategies rather than through negative consequences. Try continuing to prompt them while not providing eye contact and not commenting on his efforts to sit on the floor. Encourage and praise any participation in the activity while increasing social interaction when he is working.

The above strategy is only one option to assisting the individual used in the example. Observation is key to actually designing a support strategy. This includes observation of the staff and other people that are interacting with the person with a disability as well as the individual. The function or purpose that a behavior is serving can be many and varied. This includes the possibility that the individual is communicating that he or she does not want to be in the workshop or perform the activities that are available!

Completing an analysis of how the behavior has been learned and maintained is the first step towards providing positive supports. This process can be completed in a customized community job, and the individual should not be limited to receiving services only in a facility-based program. In addition, attempting to eliminate the behaviors prior to locating a job in the community may be unnecessary. The behavior may occur at the agency but never occur in the community business.

Q

Do employers and coworkers have the time to provide the needed support and supervision for an individual with a significant disability? All this sounds like a lot of work!

A

The first important point is to look for companies that provide consistent support and supervision to all workers, not just workers with disabilities. If an individual with intensive support needs is placed in a work environment where all workers receive minimal or no supervision, the person most likely will be set-up to fail. Second, look for work sites where coworkers or supervisors would be in close proximity to the worker with a significant disability. Talk with the employer about how the individual could receive positive feedback when coworkers walk past the individual's work area. Employment specialists can help by observing and determining naturally occurring times of the day when coworkers are available to provide support. As previously mentioned, the individual also needs to learn how to monitor his or her work performance. The goal is to determine how the employer and the coworkers can assist the individual from the first day of employment rather than creating dependence on the employment specialist.

Summary

The key to success for supporting individuals with significant disabilities in community integrated employment settings is to implement the types of strategies and suggestions discussed in this fact sheet. Agencies that have made the commitment to customizing jobs and providing individualized supports find that they are able to serve individuals who have typically been excluded from community business settings.

Additional Resources

The National Survey of Community Rehabilitation Providers, FY2002-2003, information is available online at http://www.t-tap.org/strategies/change/icisurvey.htm.

Information for this FAQ sheet came from: T-TAP (Training and Technical Assistance for Providers)

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Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

April, 2005

Employment Supports for Individuals with Severe Mental Illness

Programs providing employment supports are a valuable resource for people with severe mental illness seeking competitive employment. Employment is a key component of recovery. Individuals with severe mental illness who hold competitive jobs for an extended period of time frequently experience a number of benefits, including improvements in their self-esteem and symptom control.

Effective employment programs targeting individuals with severe mental illness emphasize encouraging interest and building confidence in working, getting a job consistent with individual work goals, and retaining employment. Employment services that follow seven evidenced-based practices have proven successful in assisting people with severe mental illness in achieving and sustaining employment outcomes. The following information summarizes these seven key practices and provides additional resources on effective employment supports for individuals experiencing severe mental illness.

1. Participation in the employment program is based on consumer choice.

True consumer choice requires access to information necessary to make an informed choice. Practices that encourage informed consumer choice about employment include:

- Creating an atmosphere where anyone who chooses to work can work.
- Asking consumers if they want to work as soon as they enter the employment program.
- Promoting employment consistently and regularly as a positive, achievable outcome.
- Encouraging consumers to talk about their fears and concerns about work and providing the assistance needed to address these concerns.
- Building confidence by giving attention to each individual's strengths and motivations.

Programs that successfully promote informed consumer choice take a systematic approach incorporating these practices. These programs recognize that for individuals with severe mental illness, consumer characteristics do not predict success in competitive employment. Gender, ethnicity, diagnosis, hospitalization history, cognitive functioning, education, or substance abuse history are not predictors of employment success. Instead, employment programs are most successful when they operate on the principle of "zero exclusion." Anyone who expresses a desire to work and makes an informed choice to participate in an employment program is eligible.

For a variety of reasons, programs that use the zero exclusion approach do not assess consumers for work readiness using traditional methods, such as standardized aptitude tests. These assessment methods have in the past screened out consumers with mental illness at a high rate, including many who could successfully work, and take resources away from services that could be better directed to helping people find jobs. Also, most standardized assessment approaches do not actually predict which individuals will work. And finally, these assessments typically do not give information about what interventions to offer as a way to help consumers work successfully.

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2. Employment supports are integrated with mental health treatment.

It is very important for consumers with severe mental illness that employment supports be integrated with any mental health treatment. Employment efforts will unlikely be effective if the person is not receiving adequate clinical case management. Practices that promote integration of employment services and supports with mental health treatment include:

- Employment support team members are in frequent contact with case managers.
- Treatment plans and employment plans are coordinated and mutually supportive.
- Treatment team meetngs include employment staff and consideration of employment plans and issues.

For integration of employment and mental health services to be effective, there must be genuine collaboration and mutual problem solving. For example, medication or housing changes should be coordinated with employment changes, If they aren't, responsibility for follow-up becomes unclear, and employment staff may be caught up doing crisis intervention, a role more appropriately fulfilled by case managers.

Integration of employment and mental health services contributes to lower employment program dropout rates, because case managers are involved in keeping consumers engaged. Clinicians and employment specialists report better communication. Clinicians become involved and excited about employment, and the close working relationship between the clinicians and the employment team results in clinical information being a part of the vocational plan.

3. Services are focused on competitive employment as the goal.

Individuals with severe mental illness have historically received services in day treatment or sheltered programs that focus on an array of rehabilitation activities, protected job options, or short-term work experiences. However, prevocational preparation, extended career counseling, or other work readiness activities do not effectively promote competitive employment outcomes. In comparison, practices that focus on competitive employment as the goal include:

- Targeting attention and resources on work as a goal the moment the individual enters the program.
- Stating benefits of work and encouraging success.
- Avoid spending time/resources on work readiness experiences or extended periods of assessment.
- Assuring assessments occur quickly and build on consumers desire and motivation to work.

In providing employment services and supports, it's essential to devote resources and energy assisting consumers with finding competitive jobs. From the moment a consumer begins the program, communicate clearly that an integrated competitive employment outcome is the goal and focus all employment services and supports on directly meeting that goal. Avoid volunteer approaches or paid employment options that are not from the competitive employment job market.

4. A rapid job search approach is used.

A rapid job search approach means that contact will be made with employers within the first month after a consumer enters the employment program. Most consumers with mental health support needs prefer working towards an employment outcome instead of transitional preparatory activities. In fact, work readiness or other preparatory activities that delay competitive work can actually reduce prospects for community employment. Practices focusing on a rapid job search include:

- Providing direct assistance in job finding through job leads and active job development.
- Emphasizing on-the-job training with supports at the job site.
- Obtaining rapid approval from funding agencies for employment plans.

Many employment programs receive funding through fee-for-service programs such as Vocational Rehabilitation (VR). A rapid job search will not take place when there is limited coordination between the funding entity and the employment agency. Let funding sources such as VR and other fee-for-service programs know as early as possible when new consumers who potentially have employment goals enter the program. Make any testing, treatment, or related background information available (as long as there is approval by the consumer to share this information). Schedule regular staffings or case conferences to be sure information is shared as necessary. The job search process will vary in strategy and timing from person to person. However, established collaborative practices among key stakeholders in the job search process will help support a rapid movement to employment.

5. Job finding is individualized with attention to consumer preferences.

Job finding is a collaborative process between the con-sumer and the employment support team. This process emphasizes use of a consumer's preferences, strengths, and prior work experiences. Practices that focus on consumer preferences include:

- Working closely with consumers' personal interests.
- Seeking jobs and workplace environments that match individual preferences.
- Helping individuals make informed choices about disclosing a disability to employers.
- Working closely with the consumer and employer on identifying and negotiating needed workplace accommodations.

The collaborative process between the consumer and the employment support team emphasizes job selection taking into account job duties, location, hours of employment, work environment, and other factors related to satisfaction and success in working. Job matching can include arranging customized employment opportunities with employers through job carving, negotiating job descriptions, or creating job descriptions. Consumers are much less likely to quit their jobs if these initial positions are consistent with their preferences. In addition, consumers working in fields consistent with their preferences have higher job satisfaction. The emphasis on job matching contrasts with conventional ideas of developing a pool of jobs and then offering consumers jobs from this pool.

6. Supports are ongoing.

Placing arbitrary time limits on supports after a person is employed is very detrimental to employment success. The availability of continuous supports, including replacement assistance, is often closely tied to funding policies and performance standards of the various employment support programs. Funding agencies will usually be much more flexible in approving job related supports when there is clear evidence that these supports improve the likelihood of job success. Practices that emphasize the continued availability of ongoing supports include:

- Assisting individuals in discovering their true job interests by working in competitive employment.
- Maintaining direct supports to consumers and employers (where appropriate to an employment plan) after obtaining work.
- Assisting people with moving into new jobs as long-term job interests are clarified.

In many states, funding for employment services is time-limited, triggering rules on how long someone is eligible. The funding may shift from one source (such as Vocational Rehabilitation) to a second source (such as Medicaid) after a specific period of time a consumer is employed. It is critical that employment programs find ways to customize supports and continue to stay in contact over the long term. For example, negotiate flexible funding arrangements not tied to strict time limit rules. The key to successful negotiating is demonstrating that maintenance of supports minimizes "revolving door" demands on funding agencies, i.e., when a consumer receives a time-limited service and then loses employment as soon as supports are removed, necessitating a new employment plan.

7. Benefits counseling is used to educate consumers on the effect of earnings on benefits.

Some individuals with severe mental illness receive disability benefits such as Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI). Many also receive benefits related to health care, housing and/or food assistance. Benefits planning services are an important employment support. Practices that focus on benefits planning include:

- Assuring consumers have access to benefits counselors and understand the interaction between work earnings and disability-related benefits.
- Addressing concerns individuals have about the potential loss of benefits after employment, fears frequently based on rumors and misconceptions.
- Assuring job plans (hours of employment, pay, and benefits) are coordinated with benefit plans developed during benefits counseling.

The Social Security Administration has implemented a national Benefits Planning, Assistance and Outreach (BPAO) to assist individuals with disabilities receiving SSDI and/or SSI. The BPAO program is comprised of 117 projects across the United States. The projects pro-vide information and assistance on how benefit pro-grams and work incentives interface with earnings from employment and self-employment. The location of the BPAO projects can be obtained from the VCU Benefits Assistance Resource Center at http://www.vcu-barc.org/ In some states, there are also individuals and organizations that can provide fee-for-service benefits counseling and assistance for individuals with severe mental illness not receiving SSI or SSDI benefits.

Conclusion

These seven principles establish a core framework for building an effective program of employment supports for individuals with severe mental illness. Many are drawn from the Individualized Placement and Support (IPS) approach to providing employment supports to these individuals. The principles have direct implications for employment service providers, agencies purchasing employment services, and consumers .

- Providers -- the principles provide clear guidelines for program development.
- Funding agencies -- the principles establish a basis for purchase of service guidelines and quality indicators.
- Consumers -- the principles provide a measure for making informed choices about service providers and identifying which providers will be most effective in supporting the achievement of individualized employment goals.

Employment programs that follow these evidence-based practices will be more likely to effectively and successfully assist consumers with severe mental illness in meeting their employment goals.

Resources

- Employment Information for Consumers — http://www.mentalhealthpractices.org/se.html
- Employment Information for Practitioners — http://www.mentalhealthpractices.org/se_pcs.html
- National Alliance for the Mentally Ill (NAMI) — http://www.nami.org
- National Mental Health Consumers' Self-Help Clearinghouse — http://www.nostigma.org/
- Implementing Supported Employment as an Evidenced Based Practice — http://www.mentalhealthpractices.org/pdf_files/bond.pdf
- Fact Sheet on Customized Employment – http://www.t-tap.org/strategies/factsheet/odepfactsheet.htm

Resources for further study from which this fact sheet was developed

- Bond, G. (2004). Supported employment: Evidence for an evidence-based practice. Psychiatric Rehabilitation Journal. 27(4), 345-359.
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- Ridgway, P., & Rapp, C. (1998). The active ingredients in achieving competitive employment for people with psychiatric disabilities: A research synthesis. Lawrence, KS: University of Kansas School of Social Work.

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Q & A on Customized Employment: Addressing Parental Concerns

"To Work or Not to Work"… that is a question being asked by many individuals with disabilities and their family members as they begin to think about going to work in their local communities. This fact sheet addresses frequently asked questions by family members and provides answers to dispel the concerns. After reading this, it is hoped that family members will agree that the answer to the question: "To Work or Not to Work" is "To Work!"

Q **I have been told that my son/daughter is not ready to work in the community.**

A Customized employment eliminates the need for a person to "get ready" to work. If your son/ daughter wants to go to work, then it is time for him/her to go. A key aspect to customizing employment is finding work that matches your son's/daughter's interests and skills. Using this approach, a personal agent or employment specialist works closely with a job seeker to negotiate a specific position that uses the person's talents to match the needs of a business. The goal is not just to locate any job, but a job specifically negotiated that capitalizes on your son's/daughter's interests and abilities.

Q **But, my son/daughter does not have the skills to meet the demands of a real job and needs training.**

A Many people with significant disabilities do not transfer skills learned in one setting such as a workshop to another such as a community business. One of the reasons is that it is difficult to simulate the features of a job in a setting that does not have coworkers and the demands of a real workplace. For instance, your son/daughter may be in a training program to learn how to work in an office. The participants in the program take turns completing tasks such as sorting mail, delivering messages, and folding letters and stuffing envelopes. However, typically position descriptions change from business to business. The way that one office prepares and delivers mail can be very different from another. The time spent learning the task in the training program would be better spent in the actual workplace where your son/daughter is employed.

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The workshop is a safe place, and I don't think my son / daughter should be alone in a community job. He / she has never been without the support of the agency's staff.

Looking for a "safe" place to work is also part of the customized employment process. First, "safe" needs to be defined in relationship to your son's/daughter's support needs. For example, a person who has a history of walking out of any door at home or the workshop may have a very different safety concern than the person who just lacks community based experiences. In some instances a workplace that limits access to the outside or machinery may be warranted. Another person may just need to have a little extra support from a coworker.

Your safety concerns will be taken into consideration when negotiating work. It is only natural for you to be concerned about your son's or daughter's welfare. For example, part of the negotiations might include arranging for some additional supervision or creating a job where your son/daughter works alongside a coworker who is aware of the support need. Once again, an agent would work closely with an employer to negotiate a job that minimizes your son's/daughter's disability and provides the workplace supports necessary for him/her to be successful.

How would my son / daughter learn the skills in the workplace?

Key to the negotiation process is the employer's willingness to support whatever your son/daughter needs to become successful at work. For example, sometimes a job applicant with a disability will need more skills training than the employer is able to provide. In such a case, a trainer sometimes called an employment specialist will go to work with the individual and provide additional on-the-job training. Or perhaps, the person needs to use an assistive technology device to get the job done like using a reaching device to pull items off of a high shelf. Another, job applicant may need a modification in a company's policy that would allow him/her to work a flexible schedule. Workplace supports vary from individual to individual and are tailored specifically to meet the needs of an individual in a customized job. At the end of the process, when the deal is struck, the result is a custom made job for your son/daughter.

I don't know what kind of job my son / daughter would like.

A personal agent or employment specialist will spend time getting to know your son/daughter as well as your family. For instance, an employment specialist may spend time with him/her in the community doing leisure activities, talking with family members, meeting with friends who know your son/daughter well, and so forth. The time will be spent discovering his/her interests, abilities, and support needs.

Occasionally there still may be uncertainty about what your son/daughter might like to do. If this happens, several types of jobs will be identified that appear to match your son/daughter's expressed work interests. Then, he/she can have a brief work experience, perhaps 3 - 4 hours within each job type, to more specifically identify his/her work preferences and support needs. This information will be used to customize a job on your son's/daughter's behalf.

Now prepared, the personal agent or employment specialist will begin to identify potential places of employment in the local business community. You may even be asked if you know employers in your network that would be willing to support a person with a disability in the workplace. The agent will meet with employers to learn more about the business and specific needs of the company. Whenever an employer has some suitable opportunities that match your son's/daughter's specific interests and needs, the job negotiation process will begin.

A good customized job individualizes the employment relationship between employees and employers in ways that meet the needs of both. A proposal will be prepared for the employer's consideration that will highlight your son's/daughter's abilities and how he / she can bring value to the business. Once a proposal has been made and both the job applicant and employer agree to the proposal, a work start date will be set.

How will my son / daughter get to work? The community rehabilitation program provides door-to-door transportation service.

A critical aspect to customizing a job for your son/daughter will be finding work opportunities at locations where transportation will not present a barrier. Every situation is different. For example, some people may travel to work using public transportation, while others, ride with co-workers, take specialized transportation services, or walk.

Part of getting to know your son/daughter will be exploring various transportation options. This information is vital to the strategic plan for customizing employment, since it influences the scheduling requirements and the work location. For instance, your son/daughter may have access to the public bus system, but lack the skills needed to get to the bus stop and ride the bus alone. In this case, a transportation trainer can teach your son/daughter how to get to and from the job on the bus. Or, another option might be that the place of business is on a friend's route to and from work. This could become part of the employment negotiation process. For example, employment negotiations may center around a specific work schedule that would allow the person to work a schedule that matches the friend's daily commute times.

If you are not comfortable with these options, we can determine if there is a specialized transportation service in the community that can offer door-to-door service. Or, perhaps a college student or senior citizen would like to earn extra money providing transportation. You can be assured that the support needs of your son/daughter will be met so that everyone feels comfortable. He/she will not be left alone until the skills to get to and from work independently have been demostrated.

But, that would cost extra money. I don't imagine that he/she would be making very much anyway.

Your son/daughter would be making at least minimum wage or more based on what other workers earn who are performing similar job duties. The amount would be negotiated with the employer at the time of hire and again during the course of employment for pay raises. In addition, if your son/daughter is receiving Social Security benefits, he/she may be able to claim an Impairment Related Work Expense (IRWE). This is a work incentive designed to assist people with disabilities in paying for expenses that are needed to work. Specialized transportation is one such expense. Basically, a person can deduct the cost of services and items needed to work and reduce the amount of countable income. When Social Security calculates how much a person will receive in the monthly check, an IRWE allows him/her to keep more money than if there were no work expenses. While he/she will not get all of the cost of transportation covered through the work incentive, your son/daughter should have more money available than if not working or working in extended employment options (sheltered workshops).

Well, that raises another serious concern! My son/daughter can't lose Social Security benefits and Medicaid. The reality is that he/she needs the benefits and health care coverage.

The answer is to get informed! You should contact your local Social Security Administration Office to locate a Benefits Planning Assistance and Outreach Specialist. This person can sit down with you to explain the basics of how work will impact your son's/daughter's monthly benefit check. You also will need more information on work incentives. These incentives were developed to encourage Supplemental Security Income (SSI) recipients and Social Security Disability Insurance (SSDI) beneficiaries to become self-sufficient. The IRWE is just one of the work incentives that can help your son / daughter. Others include the Earned Income Exclusion, PASS (Plan for Achieving Self Support), and Section 1619 (a) and (b).

Under Special SSI Payments for People Who Work: Section 1619 (a) and 1619 (b), a worker can continue to receive Medicaid. Under Section 1619 (a), your son's/daughter's check could be reduced as low as one cent due to work income, and he/she still receive Medicaid. Eligibility continues as long as your son/daughter meets the basic eligibility requirements and the income and resources tests. Under 1619 (b), Medicaid coverage continues even when earnings become too high to receive a SSI payment, but there are threshold levels in each state. Some states have eligibility rules for Medicaid that differ from SSA's. This is information that you will need to discuss with a Benefits Specialist to find out exactly how work will impact your son's/daughter's benefits. However, he/she can always earn more money working than by just receiving benefits

alone. If you still feel unsure after meeting with a representative, talk to other family members who have adult children with disabilities who receive SSI and are working in the community. You can also download a booklet produced by the Social Security Administration, The Redbook, which provides more information and sample calculations on how work can impact benefits at http://www.ssa.gov.

Q **A** **My son/daughter has friends in the extended employment program. Going to work would mean losing those friends.**

If the opportunity to make friends is important to your son/daughter, then this along with other key information would be taken into consideration during negotiations with employers. Every workplace culture is different. For instance, some are friendly and others are not. To understand the workplace culture, the person representing your son/daughter would ask the employer questions and look for signs that the workplace is friendly and supportive. For example, employees who appear to be enjoying their jobs may signal a pleasant place to work.

Developing a good fit between a person and the social characteristics of a workplace is as important as learning how to perform a job. Many people with significant disabilities report making new friends at work and an overall, satisfaction with employment. Your son/daughter would have support establishing relationships with coworkers. Social activities that are available to other employees would also be available to him/her. Going to work also does not mean that your son or daughter has to give up friends from the workshop. They can still socialize outside of the workshop setting. Working should expand his/her social opportunities and not limit them.

Q **A** **What if my son/daughter loses the job? Can he/she go back to the workshop?**

Negotiating a customized employment opportunity for your son/daughter hopefully will prevent this from happening. Rest assured that staff will work hard to solve any problems that come up during employment and to address any support needs that could lead to job loss. This includes re-negotiations with the employer, if necessary, to further customize your son's/daughter's job.

But, of course people still lose jobs. If this occurs, staff will work with your son/daughter to find a new job in the community. A new position will be negotiated based on what is learned in the first job about his/her interests, work skills, and support needs. Our program staff is always willing to talk with you whenever you have additional questions!

Summary

Hopefully that this fact sheet has provided information on what parents want to know about customized employment. There are other resources available online at the project's website: http://www.t-tap.org

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T-TAP

Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

October, 2004

Q & A on Customized Employment: Workplace Supports

All workers, not just individuals with disabilities, require different types, levels, and intensity of supports in their work places. Businesses provide supports to their employees and offer them a wealth of resources during the normal course of business. However, some employers may need additional assistance in creating workplace cultures that are supportive of individuals with disabilities. This additional assistance or workplace supports may be provided by an agency such as a Community Rehabilitation Program (CRP). The goal is to work with employers so that businesses can increase their capacity to support workers with disabilities. This fact sheet will address some of the commonly asked questions about the level and intensity of workplace supports that individuals with disabilities may need to obtain and maintain employment.

Q **A** **What are workplace supports?**

Workplace supports typically exist in a business and are available to all employees. They may include but are not limited to such things as a co-worker mentor who assists an employee in learning the job, a supervisor who monitors work performance, a co-worker who assists the new worker in developing social networks, or making maximum use of orientation training. This also could include other company sponsored training events, programs and benefits such as an employee assistance program. Workplace supports also may be specifically designed to assist a particular employee with his or her job performance. This could include modifications to the work environment, adjustments to employment policies or practices, and/or changes in the way certain job functions are performed that allow the employee to get the job done successfully.

Q **A** **What are some examples of workplace supports that may already exist in a business?**

Three major categories of workplace supports that may already exist in a business are environmental, procedural, and natural. Environmental supports are defined as physical structures, surroundings, or objects present in the business that make the job site more accessible for current or future employees. For example, automatic door openers may be available when entering the building or signage on the walls may help employees successfully navigate from one department to another. Procedural supports are actions or activities that employers provide to assist potential or current employees with performing their jobs and job related functions. For instance, flextime may be offered to allow employees to work within the hours that are more conducive to their personal lives. Natural supports exist in any workplace and are informal supports that are typically available to any employee. This might include worker's sharing rides to and from work, a senior staff member helping a new co-worker get the job done when he/she needs extra assistance.

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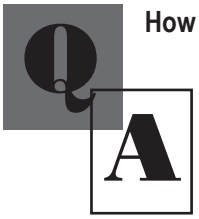

How will staff know what workplace supports are needed?

Sometimes, job selection can reduce support needs. For example, a job that is negotiated to highlight a person's strengths and accentuate abilities may help eliminate the need for adding workplace supports. Initially observing what a worker can do can also help determine what, if anything, is needed. At times an individual's support needs will be obvious. For example, a person who uses a wheelchair for mobility will need an accessible workplace or modifications to the existing environment. Other times, the necessary support may not be readily apparent. Worker behaviors that may signal the need for providing additional workplace supports are failing to initiate an activity, not switching job tasks, difficulty performing a duty, inability to meet established production standards, repeatedly asking for assistance, or making the same mistakes over and over again.

Can't individuals with disabilities access workplace supports on their own?

The person with the disability may already know or have some ideas of what he or she needs. At other times, the individual may need guidance. Taking advantage of the support resources that are available in a workplace may not automatically occur for many individuals with disabilities.

Even if a resource exists, the individual may not know how to access or benefit from its use. He/she may be unaware of the potential support, how to choose among the support alternatives that are available, or how to access a desired resource. In addition, a company may have varying levels of resource options. For instance, one company may have an intensive orientation and training program while another has none. The existing workplace supports within any company must be analyzed to determine if they meet the needs of the individual with a disability who has been hired. A one time, two-hour lecture on company policies may be of little benefit, while a co-worker who explains the "unwritten rules" of the workplace to the new employee with a disability may be an extremely valuable resource.

CRP staff, such as an employment specialist, can initially take the role of helping the individual identify, choose, and access the needed supports at whatever level of assistance that the individual prefers. This would of course include helping the employer identify and provide the needed workplace supports. The goal is to assist the business in supporting the individual with a disability rather than the person continually relying on the CRP staff.

Are workplace supports the same thing as reasonable accommodations?

These words are sometimes used synonymously; however, there are differences. Some employers may be more open to hearing about "workplace supports" since "reasonable accommodation" may conjure up unwarranted fears about complying with the law and costs associated with accommodations. Under the Americans with Disabilities Act (ADA) employers must provide reasonable accommodations to a qualified individual with a disability. A qualified individual with a disability is someone who can perform the essential functions of a job with or without reasonable accommodation. Many businesses will have a policy in place on how a request for accommodation should be handled.

Some examples of workplace supports that might be useful to an employee with a disability include having a co-worker prompt him or her to take a break, having an employment specialist provide additional job skills training; creating a quiet work area; giving an employee a written list of job duties to perform at the start of each shift, replacing a manual stapler with an electronic one, or allowing a change in the usual work schedule. Support needs vary from person to person, thus it should come as no surprise that workplace supports must be tailored to the particular situation on hand. What works for one employee in one workplace will not necessarily be effective for someone else in another business.

Are workplace supports expensive?

Workplace supports do not have to be expensive. An exemption from or modification to an existing work place policy is not costly. For example, a simple change in an existing workplace policy that requires employees to work every other Saturday may be modified for a worker who due to the nature of the disability has no access to transportation on this day of the week. Co-worker support also results in no charge. For example, a co-worker may work along side another worker and model the pace needed to meet the employer's production standard. Other simple strategies are not costly such as a warehouse worker using a computer print out to remind him of what stock to pull and where to locate various items.

When supports are purchased or fabricated the cost will vary depending on what is needed. However, most often supports are not expensive. For example, an office worker may need to have the regular computer mouse replaced with a track ball mouse, which costs around $50.00. Or an upholstery worker may need tactile cues, made of velcro, placed on the surface of a table to give information on the size of material to cut which costs about $4.00.

In any of these examples, the worker may need the additional assistance of an advocate to assist in the negotiation process and the customization of workplace supports. This could require additional funding supports that are available through the One Stop Service Delivery System, Vocational Rehabilitation services, Social Security Work Incentives and so forth.

What is the most effective type of workplace support?

The most effective type of workplace support is the one that works for the individual. For every support need that is identified, a variety of support resources may be available. All of the generated ideas should be discussed with the individual including an explanation of what using the specific support would entail. The availability of the support option, the pros and cons of each, and the level of interest expressed by the individual can be explored at the same time. Assessing these factors also can provide a direction for job selection. For example, one position offers orientation training; another provides co-worker mentoring; and a third job informally supports employees on an individualized basis. The varying levels of support offered by these employment settings combined with other characteristics of the job, such as hours, wages, co-workers and location will influence an individual's decision about where he or she would prefer to work.

In general, strategies should blend into the workplace and not make the worker stand out. Effective supports are designed with employee and employer input. In order to determine if a support is effective, a variety of factors need to be considered. Is the individual satisfied with the arrangement? Be aware that a person who is not using a newly created workplace support may be the employee's way of saying "I feel stupid using this strategy", "I do not know how to use this support" or "I really do not need this". To avoid this situation always include the person with the disability and provide skills training on support use. Next, are the individual's needs being met? How is the support impacting employment (e.g., wages, hours, quality, speed)? Is integration enhanced as a result of the support? Is the employee satisfied? Are the company's standards being maintained?

Summary

It is important to remember that any support is only as good as the outcome it is accomplishing. The most wonderful support may be useless if the individual is not happy or if there are not benefits to the workplace. Flexibility, creativity, and resourcefulness are essential elements contributing to a combination of workplace supports that will meet the individual's needs and result in a job of choice in a community business.

Information for this FAQ sheet came from: T-TAP (Training and Technical Assistance for Providers
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For more information on T-TAP, please visit: http://www.t-tap.org

T-TAP
Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

July, 2005

Q & A on Customized Employment:

Assistive Technology as a Workplace Support

What do a watch with an alarm, a day planner, a Palm Pilot, and a computer all have in common? These are examples of devices that can assist employees complete their daily job duties. For the worker with a disability such "assistive technology devices" may be vital to obtaining employment and improving daily work performance. Assistive technology (AT) can assist in bridging the gap between a person's physical abilities and the job requirements. Many workplace challenges can be either overcome or ameliorated by using assistive technology in combination with other types of workplace supports.

Despite the promise of assistive technology, many people with significant physical disabilities remain in facility-based employment programs. Underutilization of AT to facilitate competitive employment is related to a number of critical issues. This includes lack of information on available technology; lack of coordination across services; lack of training on how to use devices for users, families, and professionals; and lack of coordination in the evaluation and selection, as well as lack of funding of assistive technology alternatives. This fact sheet will provide some general information about assistive technology and provide resources that the reader can access for more information.

Q **A** **What is assistive technology?**

The most frequently quoted definition of assistive technology comes from the Technology-Related Assistance of Individuals with Disabilities Act of 1988, which was reauthorized in 1993, 1998, and most recently in 2004. In 1998, the Act was renamed the Assistive Technology Act. This law defines assistive technology as any item, piece of equipment, or product system, whether acquired commercially or off the shelf, modified or customized, that increases, maintains or improves functional capabilities of individuals with disabilities. This definition has been used consistently across legislation to include the Americans with Disabilities Act (ADA) and the Workforce Investment Act of 1998.

Q **A** **What types of assistive technology are available?**

Assistive technology is considered either "low or high tech" depending on the complexity of the devices, and materials used to produce them. Low technology devices usually are inexpensive and easy to purchase or make. Consider the following examples. A person with unsteady hand movements uses dycem (a non skid mat) to stabilize work materials. An individual with limited coordination uses a key guard over a computer keyboard to enable him to strike the correct key.

Materials to fabricate a low-tech solution can be found at many generic merchandise stores (e.g., hardware, home improvement, or computer stores) or ordered from catalogues. The cost will typically be less from these sources than if purchased through specialized vendors. Modifying purchased items can also produce low-tech solutions. Low-tech does not necessarily require specialized training to identify or make and are relatively easy to implement for individuals with disabilities. For example, a stapler could be mounted on a base with a paper guide so that an individual who uses only one hand can staple papers.

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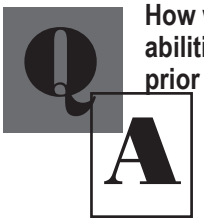
High technology devices are characterized by the use of electronics, special manufacturing techniques, and materials. Typically, high technology is obtained through specialized vendors and requires assistive technology services such as a rehabilitation engineer, rehabilitation counselor, occupational, physical, or speech therapist to acquire and put into place for the individual who requires the accommodation.

Where do you begin when assisting someone with a significant physical disability in finding community employment? Does a person need to learn how to use assistive technology before conducting a job search?

The identification of a person's career goals and interests is the first step to successful employment. Attempting to deter-mine a person's technology needs prior to knowing the person's interests can result in the purchase of assistive technology or skill training in the use of a device that does not translate to a competitive employment position. In addition, it may be difficult, if not impossible, to identify assistive technology devices without knowing what the person wants to do.

Requiring that technology be identified and purchased prior to the job search may delay access to the community. An individual may learn to use an assistive technology device as a prerequisite to employment that is not compatible with the negotiated job duties. For example, a young man learned to use a specialized software program to access a computer keyboard in anticipation of becoming employed. However, when he got his job, the software program was not compatible with the company's database. An evaluation of the person's needs for accessing the system had to occur, and an individualized program developed to facilitate employment.

The identification of assistive devices prior to employment should be considered if the device increases the person's functional capacity in any environment. In other words, the purchase of AT should match a functional need that an individual has rather than requiring that devices be identified as a prerequisite to employment. For instance, a person in a facility-based program may want to learn how to access a computer using assistive technology if the activity has an immediate functional purpose such as online banking, keeping a personal journal, or accessing computer games for leisure recreation as examples. Obviously, increased independence is a goal and should be facilitated for any task or activity and within any environment in which the person lives, works, and plays. However, requiring that a person learn to use assistive technology as a prerequisite to a job search is contrary to concept of customizing and negotiating a job based on the individual's skills and interests.



How will an employment specialist know if a job can be customized to match the interests and abilities of an individual with a disability if the person is not taught to use assistive technology prior to employment?

While learning to use devices should not be a prerequisite to employment, the identification of assistive technology that a person already uses can be helpful. Determine if the job seeker uses assistive technology devices to complete functional activities. This information can be obtained through informal interviews, during person-centered planning meetings, and during observations.

For instance, the individual who uses a mouthstick and speakerphone at home may be able to do the same at work. Another person who uses a head pointer to type letters to friends on a typewriter may be able to type on a computer keyboard for data entry. Or, the person who uses a raised toilet seat and grab bars in the restroom at the facility-based program will need the same equipment in the workplace. These are just several examples, and the intent is to identify currently used devices rather than randomly selecting and training on devices that may not transfer to a yet unidentified job in the community. Job specific assistive technology identification and selection would begin during the job negotiation and customization process.

A word of caution should be inserted here regarding allowing the technology that a person uses to "drive" the job search process rather than the interests of the individual. The purpose is to gain information about the individual as with anyone who needs assistance with obtaining and maintaining employment. The individual's interests, strengths, and skills should all be used to assist in customizing a community job.

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How will an employment specialist determine if a person will be able to physically complete job duties when working with an employer to customize a position?

Asking questions and informal observation can provide a wealth of information to include physical abilities and personal care support needs. Ideally, interviews and observations should take place in a setting of the person's choice while completing an activity selected by the individual. Functional activities for observation may include going out to dinner, going shopping, going for a walk in the person's neighborhood or park, or attending a community event.

Using an activity selected by the job seeker with a significant disability can provide insight into his or her interests and abilities. The employment specialist or personal representative can evaluate if the individual is able to select an activity of interest, set up and arrange a way to get to the location, use his or her wheelchair independently, use public or private transportation, and so forth. For someone with a physical disability, the employment specialist will be able to observe the individual's physical capacity. If the individual chooses to go out to eat, the employment specialist can learn a great deal about his or her potential needs in the workplace. For instance, the employment specialist will learn if the individual can maneuver a wheelchair in a confined space, manipulate the menu, use utensils for eating or drinking, as well as other personal care support needs such as taking off a coat or using the restroom. Watching the person complete an activity, such as removing a coat, can tell the employment specialist something about the person's physical ability to reach and his or her mobility. This observation can provide beginning insight into how much physical assistance or technology the individual may need on a job site. Visually being able to picture the person's mobility skills will assist the employment specialist when he or she is negotiating a customized job. The employment specialist will be able to consider how the person's skills can be matched to a job, given assistive technology and other workplace accommodations, as well as key information provided by the individual. Without this knowledge, a person may be "matched" to a job that is physically incompatible even with the application of assistive technology services and devices.

Who should be responsible for determining what assistive technology a person needs in the workplace?

Often employment specialists who work with individuals who have physical disabilities become very good at identifying solutions and making low tech devices. An example might be extending the legs on a table so that the person who uses a power chair can access a computer workstation. Another example might be purchasing a typing stand to make it easier to manage data entry tasks. These are solutions that someone who is familiar with an individual's physical abilities can make upon observation of a specific need. Another source for low technology solutions may be a carpenter, a "handy" parent or friend, church volunteer, or perhaps the local high school's vocational tech department. In addition, the local school system may have therapists who are knowledgeable in assistive technology who can provide advice. Establishing a relationship with these individuals may prove invaluable when customizing community jobs.

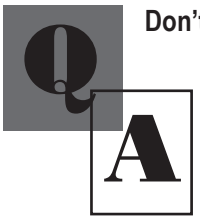
In some situations, the advice of a trained professional will be required. An agency will want the support of a professional who provides assistive technology services such as a rehabilitation engineer or occupational, physical, and/or speech therapist. If a relationship is established with a rehabilitation engineer, he or she may be able to observe a job and create a modification that will promote access to employment. These assistive technology services can be funded through vocational rehabilitation. For instance, a young woman with cerebral palsy was hired in the credit department of a bank. Part of her job was to open the mail and remove credit card payments. She was unable to open the envelopes without ripping the enclosed checks. A rehabilitation engineer fabricated a device from lightweight aluminum that she used to open the envelopes.

Isn't assistive technology expensive?

The Job Accommodation Network (JAN) surveyed employers who call for accommodation information to obtain feedback on the cost and benefit of accommodations (http://www.jan.wvu.edu/media/LowCostSolutions.html). The survey results indicated that 71% of accommodations cost $500 or less with 20% costing zero. As an example, rearranging the environment may make a workplace accessible and cost nothing. Low technology solutions tend to be less expensive, while high technology solutions can be expensive.

JAN is a free consulting service designed to increase the employability of people with disabilities by: 1) providing individualized worksite accommodations solutions, 2) providing technical assistance regarding

the ADA and other disability related legislation, and 3) educating callers about self-employment options. Funded by the Office of Disability Employment Policy (ODEP), U.S. Dept. of Labor, JAN can be reached at 800-526-7234 (V/TTY) in the U.S. or e-mail [jan@jan.wvu.edu]. JAN also provides a Searchable On-line Accommodation Resource (SOAR) system that users can access to explore various accommodation options for people with disabilities in work settings [http://www.jan.wvu.edu/soar/]. Employers may access these services as well as individuals with a disabilities, their advocates / personal representatives, family members and other professionals.



Don't employers have to pay for assistive technology if the person needs the device to work?

Small businesses with 15 or fewer employees are not required to pay for accommodations under the ADA. Companies with more than 15 employees may be required to provide and pay for a reasonable accommodation to a qualified applicant or worker unless undue hardship would result. The ADA defines reasonable accommodation as efforts that may include: making the workplace accessible, restructuring a job to best use a person's skills, modified work schedules, modifying equipment, adjusting training materials or policies, and providing qualified readers or interpreters [ADA, Sec. 101 (9) (A,B]. The type of accommodation provided is determined on a case-by-case basis and depends upon the person's needs and the possible solutions.

Most employers will work collaboratively with people with disabilities to resolve accommodation needs. However, if an employer is not meeting its duty of reasonable accommodation, there are several places to go for assistance. The United States Department of Justice (DOJ) and the Equal Employment Opportunity Commission (EEOC) provide more information on the ADA. Publications are available to download at http://www.usdoj.gov/crt/ada/adahom1.htm.

If a business makes the workplace accessible (access improvements) for ADA compliance, there are two tax incentives for employers to make accommodations and these tax incentives can reduce their federal taxes in the year that the expenses are incurred. One incentive is a tax credit that is subtracted from the business' tax liability after taxes are calculated. The other is a tax deduction that is subtracted as part of determining the business' tax liability. For more information, request IRS Publication 334, Tax Guide for Small Business, and Form 8826, Disabled Access Credit, or access these publications on the IRS web site at [http://www.IRS.gov]. Businesses should consult their accountants or a representative of an IRS office to ensure that all requirements are being met and that the correct tax form submitted.

Are there any other funding options to pay for assistive technology related to work?

There are a number of public and private options for funding assistive technology services and devices. These potential resources include State grants, loan funds, vocational rehabilitation, Social Security Work Incentives, Medicaid, private insurance; and other charitable sources such as foundations. Each of these options has specific requirements and guidelines that must be followed in order to access funds for the purchase of AT services and devices. Funding technology does not have to all come from one source. Funding tips are available online from JAN at [http://www.jan.wvu.edu/links/Funding/GeneralInfo.html].

The following websites can provide additional information:

ADA Home Page: http://www.ada.gov
Disability Rights Section Home Page: http://www.usdoj.gov/crt/drs/drshome.htm
Job Accommodation Network Homepage: http://www.jan.wvu.edu/
U.S. Equal Employment Opportunity Commission: http://www.eeoc.gov/

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T-TAP
Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

October, 2005

Q & A on Customized Employment:

Funding Consumer-Directed Employment Outcomes

In the past, funding representatives usually controlled the decisions and allocations of resources, including the choice of service providers for individuals with disabilities needing employment supports. Today, the concepts and practices of funding employment supports are evolving to focus on consumer-directed, customized employment outcomes. Since funding practices vary greatly from state to state, funds for customized employment continue to be scarce in many communities.

There are a growing number of examples illustrating the prescriptive alignment of dollars needed to provide the individualized supports that facilitate customized employment outcomes. This fact sheet reviews practices for funding consumer-directed, customized employment outcomes. It also provides examples of how community rehabilitation programs (CRPs) can encourage and support more consumer-directed funding approaches.

Q **A** **Could you define what you mean by the term, consumer-directed employment outcomes?**

Emphasis on consumer-directed services through self-determination and informed consumer choice are the cornerstone of customized employment. The first step in framing a customized employment plan is asking the question: "What are a person's dreams, interests, and passions related to living and working in the community?" The next step is to set up process where the consumer exercises control over key steps in turning those dreams into employment. Some of the key steps in the process include: choice of provider, satisfaction with the job outcome as a prerequisite for payment to the provider, and the opportunity to turn a job into a career. The extent that the job seeker with a disability controls these choices is the true measures of whether the employment supports are consumer-directed.

Employment outcomes for people with significant disabilities at times have drawn heavily on entry-level jobs in predominantly service occupations. Often, these jobs were "forced choice" situations if an individual with a significant disability wanted to work. Increasingly, providers have replaced this practice with careful job matches. This involves negotiated arrangements with employers as the foundation for customized employment outcomes. The concepts of resource ownership, business within a business, and telework are truly representative of consumer-directed customized employment outcomes.

Q **A** **How can funding approaches inhibit or encourage consumer-directed funding?**

The use of two very different scenarios can illustrate how funding approaches can inhibit or facilitate consumer-directed services. The first scenario is presented using the words of an employment specialist who works at a community rehabilitation program.

"I really want to spend time getting to know the people that I work with, but my manager says I need to move quickly into job placement. Our program does not get paid very much for planning

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and assisting people in setting a job goal. I am pushed to get people working, sometimes in jobs that really aren't a good match. I need more time to help identify a person's real job interests."

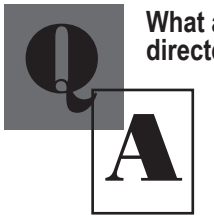
In this example, there is little evidence of a consumer-directed employment process. Limited time is available to explore and discover interests that can translate into job goals. "Getting the person a job as quickly as possible" takes precedence over carefully surveying possible job opportunities. This negatively impacts the employment specialist's ability to negotiate a customized position with an employer that best matches a person's abilities and interests, as well as the employer's needs.

The funding agency has set up restrictive time limits for services. All too frequently, jobs found under the funding pressure described previously result in job dissatisfaction and job loss. Or, the consumer with significant disabilities is moved to the end of a waiting list, because staff does not have time to customize the employment process.

Let's consider another funding approach that facilitates consumer-directed services. An employment support team is formed for a consumer that includes the employment specialist from the CRP; representatives from the local One Stop Career Center, Vocational Rehabilitation, and the Developmental Disabilities Agency; as well as key family and friends chosen by the consumer. The funding representatives collaborate on how to best match or "braid" funds in order to provide the needed services. This team explores, under the consumer's direction, possible job interests and needed supports. Together, they map out an employment plan. The satisfaction of the consumer with the services and job outcome is the critical measure used to direct funding.

The second example clearly illustrates how funding supports a consumer-directed process that targets an employment outcome, matched to the abilities and interests of the individual with a disability. Consumers can control, or at least directly influence, funding decisions in a variety of ways such as:

- The consumer uses vouchers or personal budgets to fund services.
- Funding representatives meet to proactively match resources to very personalized employment plans.
- Funding is matched to targeted employment outcomes specifically chosen by consumers.



What are some of the constraints in funding arrangements that can work against achieving consumer-directed employment outcomes?

There are a number of constraints that limit a program's flexibility to provide individualized supports, which ultimately restricts employment outcomes. Four of these are:

1. Inadequacies and inequities in rates across service options,
2. Limits on activities prior to job placement,
3. Funding that is non-responsive to individual support needs,
4. Funding that is non-responsive to career interests, and
5. Time limits on how long a service can be provided.

Inadequate rates or reimbursement policies can create financial disincentives to community programs embracing best practices in providing customized employment. If there are inequities in the rates paid for customized employment compared to other services, programs may be less responsive to the customized employment service needs of their consumers.

Funding policies can also set limits on pre-job placement activities, such as an in-depth effort to explore and discover personal employment goals and develop job opportunities responsive to those goals. These limits will restrict consumer choice and consumer self-determination in establishing a job goal. In addition, funding mechanisms that fail to take into consideration the level of support each individual needs to be successful in employment will limit access to customized employment services for people with the most significant disabilities.

Funding policies can impact the ability of an employment service provider to be proactive in meeting the job and career interest of a recipient of customized employment services. For example, setting a specific time limit on payment authorizations, such as ceasing funding 60 or 90 days from the point of job placement, can severely limit the opportunity for an individual to get assistance in making a career move after a period of employment. Funding approaches that fail to take into consideration ongoing support needs after job placement may unnecessarily limit job mobility and career advancement.

What are the characteristics of a more consumer-directed funding approach to achieving customized employment outcomes?

Funding approaches that support consumer-directed funding employment outcomes have a number of characteristics to include:

1. Expanding access to services,
2. Placing consumers in control of funds,
3. Placing consumers in control of the selection of providers, and
4. Removing funding barriers.

The first indicator of consumer-directed funding is that an individual with a significant disability has reasonable access to services. Funding policies that are not committed to funding the level of services needed for success is an example of a design that results in denial of access. This can include under-funding the support program for an individual. Access to services can also be limited by provider agencies that refuse to take referrals because of concerns that adequate funding is not available to cover the costs of providing services.

The funding of people, not programs, is the second core indicator of consumer-directed funding. The program has taken precedence over the individual when he or she asks for a competitive job and is told that those services are not available. In contrast, a consumer-directed funding approach gives control of funding allocations to the recipient of services. This can be accomplished in two ways. The first way is through a voucher system where the consumer himself or herself actually has authorization power to purchase needed services. However, use of vouchers is currently rare in customized employment services and needs to be explored through changes in funding policies.

The more typical way that the individual receiving services can direct funding is by having customer satisfaction signoff as a part of any major funding decision. For example, in an outcome-based system, one of the typical intermediate outcomes is acquisition of employment. In a consumer-directed system, a provider agency would not be paid for the services that led to the acquisition of the job unless the employee with a disability indicates satisfaction with the job. The job also must be consistent with the employment goal of that individual.

Authority to select providers is the third indicator of the consumer-directed funding system. Consumers must have informed choice regarding the strengths and potential weaknesses of provider agencies available. Information needs to be provided to consumers on the various outcomes achieved by these agencies. This information could include wages and benefits acquired as well as the types of jobs found. This information allows the consumer to get answers to the following key questions.

- Does the employment support agency focus more on service oriented, high turnover type positions, or is there a spread of positions across a variety of employment situations with indications of career potential?
- What is the job retention of consumers who have been served through this particular provider?
- What is the disability profile of individuals who receive services?

Information should be available from the funding agencies and/or the community programs to answers each of these questions. The consumer of customized employment services should be encouraged to ask these questions before committing to a program.

Finally, funding collaborators recognize the demands and limits facing each funding partner and work together to limit barriers that interfere with access to needed services and supports. A funding arrangement that sets very specific limits on the amount and/or type of services is a barrier, such as an ongoing support funding limited to 4 hours of service per month. If ongoing support funding is limited, job stability or retention may be threatened for the individual whose job assignment or supervisor changes, since a short period of more intense support might be needed. Consumer-directed funding collaborations remove this type of barrier.

Do you have examples of consumer-directed funding strategies?

The states of New Hampshire and Oklahoma provide two very good examples of consumer-directed funding strategies. Details of the research design and outcomes can be found in the referenced articles. Examples of lessons learned from both projects on the funding of consumer-directed, employment outcomes are as follows.

The Dollars and Sense Individual Career Account (ICA) demonstration project in New Hampshire

The ICA project looked at the impact on employment outcomes of greater beneficiary choice and control over vocational service planning, budgeting, and service/item procurement. All of the participants in the ICA project were receiving Supplemental Security Income (SSI) and/or Social Security Disability Income (SSDI) at enrollment. About two-thirds of the participants were consumers of mental health services; the remainder were experiencing intellectual and/or physical disabilities.

The ICA project tested whether individual choice and control over the planning, development, and procurement of career-related services would result in improved employment outcomes. The primary ICA service model included: 1. benefits counseling, 2. person-centered planning, and 3. individualized budgeting.

A budget spreadsheet was created with each participant to help organize individual employment plans and to serve as the basis for creating individualized budgets to fund plan objectives. These "Resource Plans" / budget spreadsheets listed:

a. Participant goals in their own words.
b. Objectives identified by the individual.
c. Items, goods, services and supports needed to achieve the objectives.
d. Costs, if any, for each item.
e. Anticipated sources of funding for each item or service.
f. Anticipated or likely provider of item or service.

Participants in the ICA service model did improve their levels of employment, including average hours worked and average monthly earnings during the first 18 months after enrollment. For example, participants who were employed increased from38% in the first quarter to 53% in the 4th quarter. The important lessons learned from the ICA project for this discussion is that a high percentage of participants could work successfully within a service model emphasizing consumer choice. Individuals reported overall satisfaction with the ICA service, particularly with respect to personal service, responsiveness and a sense of being heard. CRPs can work with their funding agencies to adopt the person-centered, individualized budgeting process used in the ICA project. It is a process that emphasizes funding consumer-directed employment outcomes.

Oklahoma Department of Rehabilitation Services (DRS) "KEYS to Employment" Project

The KEYS Project, funded by the Social Security Administration as a part of the State Partnerships Initiative (SPI), developed a consumer controlled voucher pilot for employment that used a combination of Vocational Rehabilitation and SSA funding to pay for needed services. Participants were SSI and SSDI beneficiaries with a diagnosis of schizophrenia or an affective disorder who were unemployed at intake. The project studied the impact on work activity that would result from enhancing choice using an assignable voucher and work incentive education focusing on maximizing self-sufficiency. Participants in the full service group in the KEYS to Employment project experienced a significant increase in partial self-sufficiency, a major project goal, and their employment rates were significantly higher than those of members of the control group. The full service group received a three-part primary intervention that contributed to improved employment outcomes. The three key strategies were as follows.

1. Assertive Engagement/Active Recruitment focused on encouraging attendance to hear about how work can be an important part of recovery from mental illness.
2. Work Incentive Education conducted by Peer Specialists addressed the issue that many consumers do not pursue employment because they fear losing their safety net and lack basic information on how available work incentives can support their return to work. The Peer Specialists presented information on Work Incentives from the perspective of maximizing self-sufficiency.
3. Informed Choice of Provider Using a Vocational Voucher where employment vouchers were issued at the end of each Work Incentive training session. After the use of the

voucher was explained, available providers were given 5 minutes to market their services. In addition, vendor performance report cards comparing vendors' results were distributed. The combination of the vocational voucher with the marketing presentation and the Provider Report Card created the decision support environment needed for an informed choice of service providers. The project sought to empower consumers to compare providers and choose the provider most likely to meet their needs.

Summary

The Individual Career Accounts and KEYS to Employment projects provide helpful examples of strategies focused on funding consumer-directed services. In each, community rehabilitation programs were actively involved in strategies that emphasized matching funding to services and em-ployment outcomes driven by informed choice. Both projects placed a high value on Benefits Counseling to assure that consumers made decisions on targeted employment outcomes fully informed about work incentives and the impact of employment on benefits. Funding was matched to needed supports through a combination of personalized budgeting, collaborative participation of funding representatives, and use of vouchers. Consumers were offered choices on how funds would be used and which programs would provide services. A high value was placed on consumer participation and satisfaction with the service process and the employment outcomes achieved. The projects demonstrate a variety of ways funding agencies and community rehabilitation program can work cooperatively to support the achievement of consumer-directed employment outcomes.

Resources

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T-TAP
Training and Technical Assistance for Providers
Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston
September, 2004

Q & A on Customized Employment: Creating a Diversified Funding Base

Customized employment involves individualizing the employment relationship between a job seeker or an employee and an employer in ways that meet the needs of both. Many customized employment outcomes are supported by blending multiple funding sources. For example, a customized employment opportunity might blend funding to purchase assistive technology drawn from an Individual Training Account through a One Stop Center with additional training and ongoing supports being paid for by Vocational Rehabilitation and from a Plan For Achieving Self Support (PASS). Community organizations providing customized employment services will benefit greatly from tapping into a diversified funding base. Diversifying funding improves the ability of a service provider to represent the job goals and choices of individual consumers responsively with employers. Diversification also presents a number of potential challenges. This fact sheet provides strategies that address key questions on both the challenges and opportunities involved with diversified funding.

Q A What is Diversified Funding?

Diversified funding involves (1) establishing a flexible funding base that includes multiple sources of funding support and (2) assuring that support dollars can follow and adapt to the employment goals and support needs of each individual consumer. Diversification is accomplished in two primary ways. First, diversification involves tapping into a full array of funding options that are consistent with the mission, goals, and core services provided by the Community Rehabilitation Program (CRP). Limiting funding agreements to a primary agency such as Vocational Rehabilitation or the Home and Community Based Medicaid Waiver restricts the CRP in terms of the population it can serve and the services it can provide. It also makes the CRP vulnerable to periodic funding shortages. There are multiple funding agencies at the state and local level that support employment related services. The CRP needs to be directly linked to this full array of funding opportunities.

Diversification also means effectively mixing program level funding with funds that exist outside of the core-funding stream of the community rehabilitation program. For example, a customized employment position might involve the ongoing assistance of an employment support person to help negotiate the customized job with the employer and to assist with training and developing co-worker supports once the job begins. The Community Rehabilitation Program might draw on its program funding agreement for the Home and Community Based Medicaid Waiver to pay for the job coach supports. However, for the individual to be successful in the job, resources and/or supports might be needed for which the CRP is not directly funded. In these situations, the funding plan for the individual needs to be diversified beyond core program funding to include more flexible, consumer-directed funding. To effectively support customized employment outcomes, the CRP needs to blend and/or braid core program funding with funds from sources such as One Stop Centers, Social Security Work Incentives, and Small Business grants and loans.

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How would creating a diversified funding base benefit a community rehabilitation program?

Community Rehabilitation Programs (CRPs) should diversify their funding bases for a variety of reasons. In these times of budget constraints and accountability at the federal, state and local levels, isolated funding mechanisms have been downsized. Many public funding agencies are placing an increased emphasis on competitive employment outcomes. These changes in the funding environment create a need for CRPs to diversify their funding base as a key organizational development strategy. For example, as of early 2004, the majority of State Vocational Rehabilitation (VR) Agencies are on Order of Selection because funding is not available to respond to the service needs of all eligible individuals. Order of Selection requires that funding from VR be prioritized to specified groups within the overall population of eligible individuals. CRPs who receive their primary funding from a state VR agency on Order of Selection could experience a significant change in funding. It is critically important that these CRPs have a diversified funding base to avoid budget shortfalls.

Funding for Community Rehabilitation Programs is frequently tied to service agreements made with a variety of funding agencies. These funding agreements frequently define specific services that can be purchased for eligible individuals. These services might include assessments, job development, and/or workplace and related training and ongoing support services. For many individuals with a disability who need a more customized employment opportunity, these core employment services need to be supplemented by other resources to achieve the desired employment outcome.

What funding sources are currently available?

The majority of funding for direct employment supports has come traditionally from state agencies that provide supports to individuals with disabilities. Depending on the population a CRP chooses to serve, typical funding entities and their service priorities may include: State Mental Retardation/Developmental Disability agencies (Wrap around services and Long term supports); State Mental Health agencies (Individualized Placement and Supports); Vocational Rehabilitation (Evaluation, Skills training, Job development, Vocational services, On the job training, the initial supports within a supported employment approach). Individual customers can also allocate personal resources from the use of the Social Security Administration work incentive programs, including Plans for Achieving Self Support (PASS) and Impairment Related Work Expenses (IRWE), or from the Ticket to Work program. Finally, organizations can consider reaching out to other state service systems that support employment, including Welfare to Work services for individuals receiving Temporary Aid to Needy Families (skills Training, job search and placement) or Workforce Development Services and One Stop Career Centers (skills training, job search and placement services).

Funding for organizational change initiatives may also be available from foundations or other charitable organizations. ARC Industries, an organization participating in Training and Technical Assistance for Providers (T-TAP), secured funding from a local foundation to support strategic planning and visits to organizations that have implemented organizational change to expand community employment. Local foundations often fund strategic planning or organizational development activities, and can also be a resource for facilitating planning efforts. On occasion, state agencies will also support change initiatives. Organizations should look beyond direct service funding to facilitate change.

How does an organization begin diversifying its funding base?

A diversified funding base creates opportunities for access to a wide array of funding that consistently supports the core mission, goals, and services of an organization. Diversified funding is most effective when a CRP has a clearly defined mission and service plan that supports competitive employment outcomes. Program Funding tied to achieving non-community integrated employment outcomes will not follow the individual into a competitive job outcome. Therefore, the first step in creating a diversified funding base is to assure that the CRP is structured to emphasize competitive employment outcomes. Traditional funding streams may not fully meet the customized support needs of individuals, and the process of redirecting resources from facil-

ity-based services to community employment may cause short-term budgetary stresses. Organizations have to assure that new funding options contribute productively to focus on competitive employment outcomes.

There are a variety of steps a CRP can use in diversifying its funding base. In negotiating with representatives of new funding options or in potentially seeking to redirect funding from an existing resource to achieving competitive employment outcomes, it is most helpful if information on current employment outcomes is readily available. Here are some suggestions on how a CRP can effectively position itself to negotiate with potential funding sources.

On an organizational level:

Collect data on your employment outcomes – It is time to invest in the collection of data about the services you offer. The system that you create needs to include statistical data about your outcomes as well as satisfaction data from all the stakeholders involved. Find out what the important outcomes are for all your stakeholders and develop data collection/tracking systems that will generate factual information about your successes in those areas.

Use the data to sell your service to new stakeholders – How do you want to tell your story? What should be the platform that is used to market your services to a diverse pool of stakeholders? Whatever system you create it has to be one that is easily configured and updated regularly with accurate information. There will be nothing worse than using old, inaccurate data to sell your service.

Collect data on your processes – Know your cost of doing business, and become sophisticated in financial planning. -- Use the data to evaluate and improve your service – Develop an internal process for a self-evaluation of your data. Create a mechanism to adjust aspects of your service operation based on the results of your data. Disseminate reports that show your results and changes your agency is making to strengthen your operation.

On an individual level:

Discuss support needs and resource options early in developing a comprehensive person-centered employment plan -- Funding should be addressed in the context of specific career goals and support needs, and developing the necessary resources should be a partnership between the provider and the job seeker. Use of PASS resources, for example, requires a personal commitment from the job seeker. Similarly there may be a wide range of solutions to barriers like transportation including sharing the costs across funding agencies and the individual, identifying low or no-cost neighbor or family supports, or cost-sharing purchase of a car with a family member using a personal loan.

What are some of the issues in diversifying funding streams?

Most funding sources come with specific guidelines or expectations about the targeted populations, required outcomes, and in some cases, the level of effort the funder is willing to support. Some funding streams may not be available as a primary source to support all individuals being served by a CRP.

Organizations can also blend or braid various funding streams as a strategy and supplement core funding with resources such as the Ticket to Work or individual resources established under a PASS or IRWE.

The transition to emphasizing competitive employment outcomes often requires organizations to shift to new funding models that are more outcome or task driven. First, when selecting new funding sources, be sure the funding mechanism does not have a negative affect on your ability to achieve your core mission and values. Second, your organization may need to build the capacity to monitor your budget's cost centers in a more detailed way. Knowing the real average cost per job placement, for example, is critical when working under an outcome reimbursement model.

What are examples of customized employment outcomes that represent use of a diversified funding base?

A young woman expresses an interest in working with children and computers. A customized job is negotiated with a daycare center where she sets up a computer lab and provides computer training for pre-school children. The necessary computer equipment is purchased through an Individual Training Account at the local One Stop Center because the daycare center does not have the funds available. Funding through the Home and Community Medicaid Waiver assists with training and ongoing support. The young woman's ownership of the computer equipment brings a valued resource to the employer. The blending of support funds helps her realize her employment goal and establishes her on a career path.

A young man expresses an interest in cars and car washing. A customized employment arrangement is negotiated with a new car wash business in his community. The business would benefit from a piece of equipment that cleans car carpets thoroughly. The young man uses his Individual Training Account to purchase the needed carpet cleaning equipment and brings this resource to his job duties with his employer. Funding from Vocational Rehabilitation and the local Mental Retardation agency are blended together for his training and support needs.

Both of these examples are actual customized employment situations.

Summary

Creating a diversified funding base is one component of an overall organizational development strategy for programs seeking to provide effective customized employment services. There are additional resources on funding and other key organizational development strategies available online at the T-TAP website: http://www.t-tap.org

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T-TAP
Training and Technical Assistance for Providers

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

July, 2005

Q & A on Customized Employment: Developing Collaborative Community Partnerships

The formation of meaningful collaborative partnerships among public and private programs and agencies is an essential way to maximize resources. Skilled professionals know that few community rehabilitation programs can undertake their employment mission alone. The sharing of the targeted resources of many agencies to different tasks is an extraordinary way to leverage dollars. Inevitably, any successful customized employment program will reflect shared interagency partnerships and collaboration. This fact sheet describes strategies that enhance the development of effective collaborative community partnerships focusing on competitive employment outcomes for individuals with disabilities.

Q **A**

Why are collaborative community partnerships important?

Collaborative community partnerships that target improved employment outcomes for individuals with significant disabilities are important for a number of reasons. First, individuals with significant disabilities face multiple challenges when pursuing employment. These challenges are related in part to the impact of a variety of obstacles potentially experienced in a job search. For example, individuals who have significant disabilities are often not well understood by the community, particularly among employers. This misunderstanding stems from the myths and stereotypes about disability that can limit vocational opportunities.

The challenges faced by individuals with significant disabilities are also related to a frequently complex, sometimes splintered, and often over-extended, service network in the community (exemplified by multiple service providers trying to help the consumer without clear lines of responsibility drawn).

Q **A**

What difficulties do individuals with disabilities face in accessing community services?

Many individuals with significant disabilities seeking employment can have difficulty accessing and coordinating the variety of services and agencies that can be involved in this process. Let's walk through a typical service scenario with a person with mental illness. The mental health center provides therapeutic and case management services, but it does not provide employment supports and does not have funds to pay for employment services. To access employment services, the mental health center refers the consumer to the Vocational Rehabilitation agency. This agency goes through its eligibility process and sets up a plan for employment with the consumer involving referral to a community rehabilitation program that will work with the person in getting a job.

One step in the job find process might involve the consumer going to the local One Stop Employment Center to review existing job opening information. If the person is a recipient of Social Security Disability benefits, such as Supplemental Security Income, it can be critically important

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that he or she be very well informed on the potential impact of earnings through employment on benefits. So referral to a Benefits Planning specialist is now added to the service mix. The individual with significant disabilities now has multiple points of contact in his or her service plan. It is very easy to see the challenge faced by this consumer in self-managing this array of services and contacts, particularly in situations where the agencies themselves have not worked out an integrated approach to sharing information and coordinating services. An integrated approach to supporting this individual is needed if the desired employment outcome is to be achieved.

What is meant by an integrated approach to collaborative community partnerships?

There are multiple agencies and points of contacts that can be involved in employment efforts for the individual with significant disabilities. This mix of service providers can have different philosophies, eligibility and selection criteria. Staff backgrounds and experiences across the programs can vary considerably.

When a consumer is dealing with a series of discrete programs, these differences become roadblocks to receiving services and to accomplishing employment goals.

When a consumer is working with an integrated service system, these differences are worked-out within the partnership, and the service flow is fluid among the partners for the consumer. The overarching goal of an interagency partnership is to create an integrated, seamless service process where the consumer can move easily from partner to partner as needed to successfully obtain, retain, and advance in employment. Effective collaborative community partnerships can move us away from offering a difficult to access series of discrete, non-aligned services and toward an integrated approach to service coordination and delivery.

What are examples of community partnerships focused on customized employment outcomes?

Community partnerships can develop across a variety of situations, such as creation of a local business network that promotes access of people with disabilities to jobs, or a agency partnership focused on meeting the individualized support needs of a specific consumer. The common thread running through each of the following examples is a clear focus on achieving customized employment outcomes.

Staff from Cobb and Douglas Counties Community Services Boards (CSB) in Georgia created connections to the business and social networks in a small community served by the CSB by forming a collaborative partnership among 12 small business owners. This partnership put into place a network of businesses that employment support staff could use in determining who in that community would be key to helping people with disabilities find employment based on each individual consumer's vocational profile and stated work goals. The network has worked extremely well. Now participants call on one another as needed regarding employment opportunities available through member businesses. CSB staff calls on the business owners to identify potential job leads.

Another example involves the CSB partnering with a church and Vocational Rehabilitation (VR). Through this partnership, a blending of resources was accomplished that supported a customer's goal of employment and independence. The church funded a portion of the cost of a van, the salary of a personal care attendant and the individual's rent; VR funded the cost of making the van accessible; and the CSB funded needed employment supports and assistive technology.

Also, a partnership was created with the local micro-enterprise development center. This partnership supports customized employment by facilitating access to creative funding sources. The local United Way provides funding managed by the micro enterprise center for Individual Development Account (IDA) micro-loans to support individual employment objectives. The partnership agreement with the micro-enterprise center facilitates access to the IDA business start-up micro-loans, grants for high-speed Internet access, and other technology grants to bridge the digital divide.

What are the major challenges in establishing effective community partnerships?

A challenge to forming effective community partnerships is addressing potential turf issues that exist among partnering agencies. Is there an agency in the partnership that is designated by law (or maybe even by traditional practices) as the lead agency for employment services for individuals with significant disabilities? If this partnership is being formed because current employment practices are not generating employment outcomes, the designated lead agency could approach the partnership with a defensive, protective attitude.

A positive strategy for defusing turf issues is involving consumer and advocacy representatives in sufficient numbers where they are not token participants. Another strategy is to disperse leadership responsibility among the partners so that it is not centered with any one agency. The partnership can also agree to the completion of a strategic plan as the first step. An agreed upon strategic plan that has the full participation of the partners and other stakeholders can guide the partnership through the implementation phase.

Another challenge is recognizing what has come before in the provision of employment services in the local community and what tensions currently exist among the key partners and stakeholders. For example, have key advocate groups gone public in their dissatisfaction with public agencies over perceived failures in the current employment service process? Are community service providers resistant to participating in the employment partnership because they perceive that current funding levels are insufficient to provide needed services? Have multiple efforts been tried previously without success to develop viable employment partnerships, leaving stakeholders skeptical about current efforts? Again, an effective strategic planning process can provide an opportunity for stakeholders to air their concerns and clear the air of tensions.

It is clear from the above challenges that each collaborative initiative is built on a unique set of factors. These factors can involve the local history among the partnering agencies, tensions that might exist between key partners, opportunities for improving employment outcomes embodied in the potential partnership, and the role of individuals with disabilities and their families and advocates. The earlier examples of collaborative partnerships taken from the work of the Cobb and Douglas Counties Community Services Boards demonstrate that potential partners are not limited to public agencies such as Vocational Rehabilitation, the local Mental Health/Developmental Disabilities agency, the Education Authority, the Employment Program, and/or Community Colleges. There is not one key community agency that is charged with lead responsibility for forming collaborative partnerships. Leadership comes from investment in the purpose of the partnership and the ability to draw-in the key collaborators needed to successfully accomplish the intended outcome. In some instances, this lead could be a public agency; in others it might be a local advocacy group who is championing the partnership effort.

How do an agency's missions, policies, production standards, and timetables impact the ability of multiple agencies to collaborate?

Effective collaborative partners understand the various missions, policies, production standards, and time-tables for each of the partnering agencies. Among public agencies, there can be differences over eligibility determination practices, fiscal responsibilities, and duration of services. These differences can be particularly problematic for the partnership when it goes to fill existing gaps in services, such as maintaining em-ployment supports for an extended period after employment. There can be different views on service delivery models, a particularly critical concern when a key partner will not endorse a service model favored by other key partners.

There can also be differences in performance goals where, for example, employment outcomes are not a driving force in the performance standards of a key stakeholder. Finally, there can be overlaps in perceived authority. These bureaucratic forces can cause havoc in interagency efforts and must be addressed early on in the partnership by keeping a clear focus on the intended outcomes of the partnership and the proven strategies that can help achieve those outcomes.

What are the primary strategies to follow in establishing effective collaborative partnerships focused on achieving competitive employment outcomes?

Effective collaborative partnerships promote actions that both improve personal outcomes for those receiving services and foster positive change in the systems that influence these services. The Institute for Community Inclusion at the University of Massachusetts Boston completed a research study on interagency partnerships (Butterworth, Foley, & Metzel, 2001). This study identified a series of quality indicators for effective strategies in forming effective interagency partnerships. For each of these quality indicators, there are a series of self-evaluation questions a partnership can use to identify its areas of strength and needed improvement. The questions focus on determining the extent to which each indicator is fully or partially in-place. For those indicators that are not fully in-place, follow-up actions can be identified and initiated. This self-evaluation can be used as a planning tool during the development of partnership and for periodic reviews in monitoring the partnership's role and effectiveness. The following presents examples of self-evaluation review questions for each of the indicators.

Indicator 1 - The partnership has a clearly defined purpose:

Purpose is operationally defined by having clearly identified outcomes and a data collection system in place to measure the intended outcomes. The outcome measures should emphasize quality of services and outcomes.

Indicator 2 - Allies to the partnership are identified and involved with the collaborative effort:

Allies to a partnership are both internal and external. Internal allies within the partnership must be identified. These internal allies are the stakeholders involved in the planning and implementation of the partnership. Support is also needed from external allies who need to ensure political support for the partnership. Allies to the partnership have a common interest in its purpose and a commitment to its success. Successful partnerships frequently have champions among their external allies who serve as key sponsors and advocates.

Indicator 3 - The collaborators are committed to the partnership and exercise ownership in carrying out its activities:

Ownership comes in part from identifying an individual from each partnering agency or program who is responsible for the implementation and success of the partnership. Inconsistent and/or rotating participation from partnering agencies will destroy the development of any real sense of ownership.

Indicator 4 - The partnership leads to actions and outcomes consistent with the defined purpose:

Having specific action plans in place where tasks are well-defined drives action-oriented partnerships. Action-oriented partnerships also have needed resources committed. These resources are both the time of the partners, particularly among the designated representatives, and in kind or monetary support.

Indicator 5 - Mechanisms are in place to communicate values and resolve differences:

Effective partnerships have organizational values that are identified and incorporated into action plans focused on meeting the interests and support needs of consumers. For example, an organizational value for a partnership focused on employment outcomes for individuals with significant disabilities could be a zero-reject approach to the consumer population, meaning that any person who expresses any interest in employment is given an opportunity. Effective partnerships also have mechanisms in place to resolve disagreements.

These five quality indicators can be extremely useful both in forming a partnership and in monitoring and continually improving an existing partnership. Conscientious use of these indicators helps keep a partnership goal and action oriented.

What are the employment supports that should be the focus of the collaborative partnership?

The first support is ongoing advocacy and commitment to the goal of employment.

This comes in part from setting an organizational climate and culture that clearly advocates for work. Competitive employment is the focal point of the employment service. Success at work is encouraged, and job-threatening issues are addressed aggressively.

The second support is facilitating employment.

Practical assistance is provided focused specifically on employment. Employment is an integral part of the integrated approach to rehabilitation services, meaning that the same workers, the same team and the same agencies work together to help the person to succeed at work, as they do for other needs.

The third support is a clear emphasis on consumer preferences and strengths.

Rapid assistance is provided when a consumer is interested in working. Supports respond to people's personal interests, goals, and preferences. Where jobs do not exist that match preferences, the supports include working with employers to develop customized job opportunities.

The fourth support is ongoing, flexible and individualized assistance provided as needed.

This includes workplace accommodations, job coaching, supportive counseling, off-site assistance, and support groups linked to other community supports, like medication monitoring, case management and housing. On-going assessments of support needs are conducted after the person is on the job. On-going assessment of the workplace environment takes place, and modifications of the workplace environment occur as needed.

The final support example is job replacement assistance.

Work in jobs in the competitive labor market helps the consumer learn more about what she or he wants from employment. Job replacement assistance encourages building towards a better match between the person's strengths and desires compared to the job characteristics. A key characteristic of continuous support for individuals with significant disabilities is assistance in planned moves to better, more lucrative, and more fulfilling jobs.

What are the potential benefits of effective collaborative community partnerships?

To be effective, collaborative community partnerships must result in improved employment related outcomes for individuals with significant disabilities. There are a variety of employment outcome benefits. The first benefit is improvement in the timeliness and quality of the services provided. The second benefit is improved employment outcomes. How do collaborators know whether these potential benefits are being realized? The answer is to set up an information system that allows the partners on a regular basis to accurately assess the outcomes being achieved. Successful partnerships lead to action and outcomes. Without dependable and timely information on service and employment outcomes, the partners will not be able to accurately identify either the strengths of the collaborative effort or the continuing issues that need to be addressed.

What are the examples of data measures that give important consumer satisfaction information on services and outcomes?

1. **Time waiting for services:**
   A consumer stuck on a waiting list or given delayed appointments for services will quickly lose interest. Waiting lists are sometimes used because of funding and/or staff shortfalls. Reducing waiting lists and time delays in accessing services are critical initial focal points of a partnership targeting improved employment outcomes.

2. **Time between intake and job placement:**
   Rapid movement to employment is a key to improved employment outcomes for individuals with significant disabilities. Movement to employment can be delayed by a variety of factors, such as overemphasis on temporary work experiences or staff difficulties in helping consumers match to an appropriate job. Just like time delays in initiating services, time delays between intake and job placement can cause frustration for the consumer and lead to high dropout rates. Partners need to regularly measure the time between intake and placement and take action if that time is regularly exceeding 30-45 days.

3. **Number of persons assessed but not placed:**
Programs can sometimes find themselves providing assessment services to a much higher number of people that those who actually start working. Assessments are important, but assessments without job outcomes are a waste of resource and symptomatic of a problem the partners need to address. Maybe there are staff development issues where staff is unsure about approaching employers; maybe the job placement service is understaffed. Tracking the number of persons who are assessed but not placed is critically important in assessing the quality of employment-focused partnership.

4. **Number of persons achieving employment outcomes and wages earned:**
An increase in the number of persons achieving the targeted employment outcomes is the primary indicator of a successful partnership. It is the most critical outcome measure and must be tracked closely if the partnership is truly committed to measuring its success. It is also important that wages earned by consumers are tracked. If high employment outcome rates are dependent on frequent use of low paying job opportunities, the partnership needs to concentrate attention on improving wage outcomes.

5. **Number of persons successful in first job placement and number moving to subsequent employment opportunities:**
Movement from a first to subsequent job placements is not a sign of failure in the first job. For many individuals who are either new to the job market or who are working on reentering the job market, the first job experience can be a trial work experience. The lessons learned from that first placement can help in improve subsequent job matches and support plans. However, a constant turn over in first jobs can also be a sign that staff is struggling with the job development process. It is important for partners to know the success rate in first job placements so that fact-based decisions can be made about staff development activities and allotment of staff resources.

Summary

A final comment on effective collaborative community partnerships: Successful partnerships have a clear mission, focus on actions that produce intended outcomes, and consistently track and evaluate their impact. Partnerships with an employment mission for individuals with significant disabilities must focus their attention on the timeliness and quality of both services delivered and job outcomes achieved. Employment service and outcome data are critical to the partnership in determining the extent that it is successfully fulfilling its mission.

Additional Resources

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T-TAP

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

November, 2004

Q & A on Customized Employment: Successful Organizational Change

Over the past 20 years, there have been substantial changes in the delivery and funding of day and employment services for individuals with disabilities. Some organizations have successfully shifted emphasis from facility-based services to community employment. However, many individuals with significant disabilities remain in 14 (c) Special Wage Certificate Programs. The FY 2002-2003 National Survey of Community Rehabilitation Providers (CRPs) found that individuals with developmental disabilities continue to be predominantly supported in sheltered employment or non-work services (ICI, 2004).

Recently, the term customized employment has come to represent a flexible approach to individualizing the employment relationship between employees and employers to facilitate integrated employment outcomes. This fact sheet will summarize the experiences of six CRPs that successfully shifted focus from facility-based services to community employment outcomes in which individuals with disabilities earn at least minimum wage. The experiences of these organizations suggested seven characteristics that support organizational change and higher rates of participation in competitive employment.

Q **A**

How were these characteristics for organizational change identified?

Interviews were conducted with key stakeholders at 6 organizations throughout the United States that successfully shifted focus from facility-based services to community employment. These CRPs were selected using a national nominations process as well as the results from a national survey of 643 Community Rehabilitation Providers conducted by Institute for Community Inclusion at University of Massachusetts Boston. Interviews were completed with agency staff, individuals with disabilities, family members, board members, and staff from funding agencies. In addition, individuals with disabilities supported by these CRPS were visited at their community work sites when appropriate.

Q **A**

What are the agency characteristics that appear to support better employment outcomes?

The six CRPs shared a well-defined culture that emphasized clear and shared values, innovation, and a willingness to take risks. While each agency differed in their approaches, seven themes were identified that characterized the organization's ability to expand employment outcomes for its customers with disabilities. These organizational characteristics include: 1) an openness to risk taking, 2) shared values that direct service delivery, 3) an ongoing process for self-evaluation, 4) linkages to external resources, 5) a holistic focus on individual needs, 6) staff participation in the development of organizational goals and decision-making, and 7) an organizational emphasis on continuous improvement.

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Could you explain these characteristics further? For instance, how were the organizations open to risk taking?

These CRPs were willing to take action in situations with uncertain outcomes or when details had not been worked out. Staff in these work cultures had great tolerance for change and uncertainty. One staff member noted that, "you can't ever just get locked into one thing because as soon as you do we go a different direction. So I've learned to enjoy that, and become more flexible as time goes by." The executive director of this agency stated more directly, "I think we didn't need everything to be in place prior to it happening...everything can't be just right for it to happen, or it will never happen."

How did these organizations demonstrate shared values that directed their service delivery?

The organizations were characterized by a clear value structure that was shared across staff and other stakeholders. One staff person reported a clear commitment to the capability of any individual to succeed in integrated employment, which was a common value across all six organizations. Concurrent with these shared values were strategies for communicating and maintaining them, such as written policies within the organization. One CRP established agreements about how the agency would function that emphasized openness and personal responsibility. Along with the mission, these agreements are communicated aggressively with staff and others. One staff member summarized the effect as "this company has a lot of faults and a lot of strengths, but you can't fault it for not being clear about its values. Somebody comes to work here and feels they want to cut a corner in terms of integrity, you just don't do that here."

This combination of strong commitment among staff and established strategies for sharing values are repeated across these organizations. At one of the six CRPs, specific targets for consumer representation on the board and on staff set a clear value for the individuals the organization supports. Another organization set clear principles for its employment supports including statements that all jobs would be individual placements and admission to the program would be zero-reject.

How did these organizations link to external resources?

The change processes in these organizations were almost entirely driven by internal goals and values, not by outside sources such as funding. However, at the same time, they established strong linkages with experts who were knowledgeable in the national trends of employment services. Local linkages were characterized by strong community ties. For instance, one agency established a strong Business Advisory Committee that assisted with networking to companies. This same agency also required committee members to meet individually with a program participant and employment specialist once a month to provide the participant with two business contacts per month. Another CRP emphasized reciprocity through staff participation in other community organizations. Their artisans' cooperative reaches out to the arts community through its gallery and projects like an artist-in-residence program.

Organizations also reached out nationally by bringing in experts in integrated employment as consultants and sending staff to national conferences, as well as to visit exemplary programs. These contacts had a great deal to do with setting goals and directions. One organization emphasized the importance of its connection to the National office and its information and training. Another sponsored national experts to present to area programs. Two others became involved in statewide or regional change projects that provided organizational assessment and technical assistance support for shifting resources from facility-based to community-based services. This outreach helped provide a benchmark for the change process.

How did these organizations place a holistic focus on consumer needs?

Focusing holistically on the goals and needs of individuals served was a consistent theme for these six organizations, whether they used the individual or organizational approach to shifting to integrated employment. The approaches that organizations used to consider individual aspirations included person-centered planning, holistic intake and service delivery models, and identification of support needs using the natural environment. Families and representatives from the funding source for two of the organizations acknowledged these agencies for looking at the whole individual as the basis for their services, rather than just the employment needs.

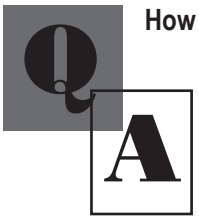
A person-by-person mechanism emphasizes the importance of listening to individuals' hopes and dreams. Two of the six organizations used person-centered planning process as both a change strategy, as well as to identify the goals of individuals that they supported. Using this planning process, it became clear to staff and families in one CRP that individuals did not want to continue in adult day care on a long term basis. Another agency emphasized planning across nine life areas, even for individuals who only receive funding for employment services. One outcome has been an emphasis on helping individual's maintain prior social relationships. For example, staff assisted an individual working in a hospital cafeteria arrange his schedule so he can have lunch weekly with his girlfriend whom he would otherwise be unable to see.

What were the staff members' roles in the development of organizational goals and in decision-making?

Staff members being empowered to take responsibility and play an active role in the organization's management resulted in consistently impressive employees at each organization. To emphasize the role staff plays in managing the organization, two agencies implemented self-managed teams as part of the process. At both organizations, the most complete incorporation of this concept has been in employmentservices.

Parents, funders, and board members described staff as creative, always having a positive attitude, willing to take chances to make something work for an individual, and driven by values. A representative of the funding source at one organization described the placement efforts of staff as follows: If there is somewhat of an impediment, they can work through it and the consumer is not blamed. It's not a matter of 'well that person isn't ready' or 'if this person did something different we would be able to place them. It's always the environment isn't right, we will get there....[I] never hear negative [from the staff].

Staff members at two of the CRPs were actively involved in the planning of organizational goals. Their input was obtained through staff retreats. At one, staff and consumers continue to participate in "think days" where they con-sider the direction of the organization. A manager at another described how staff put pressure on managers to make change. "You might not always get what you wanted, but you certainly could get your voice heard. Then I think having staff who felt comfortable enough to come to us as directors and say wait a minute. You are sending us to all these great trainings, and we are coming back hearing what all the other agencies are doing, we are not doing this."



How did these organizations place an emphasis on continuous improvement?

The focus on continuous improvement required staff to be flexible, since service approaches were changing frequently. In addition, they were required to be creative in developing new approaches when something was not working. This was reflected in some cases as a strong value for entrepreneurialism by staff.

Creating a culture that supported this entrepreneurial spirit was related to the organizations' emphasis on self-evaluation. One staff member reported that the organization tended toward hiring staff that were not satisfied with the status quo and were enthusiastic about finding better ways to do things. Another rewards staff for new ideas. By offering a financial bonus for innovative ideas, the message of continually looking for a better way to do business is clear to individuals at all levels of the organization. One vice president described the organization's culture: "We continue always to look for better ways to do what we're doing … So if you like change, this is the place to work; if you don't like change, this is not the place to work. So in our hiring of staff, we make that very clear up front, because we change a lot here."

What can my organization do?

ll organizations that implement a change process need to be clear and uncompromising about their goals and purpose. Each organization sets a clear goal and direction to increase integrated employment for the people they serve. They implemented policies and strategies that supported that goal. They used a variety of strategies to reinforce that goal, including staff training, use of external consultants, establishing a no-entry policy for facility-based programs, and reorganization into self-managed teams.

The importance of organizational communication was universally addressed across stakeholder groups and across organizations. Change is stressful for all stakeholders, and several organizations emphasized

the need to attend more to both individual and group communication to keep stakeholders in touch with the organization's goals and directions. Organizations described a multi-strategy approach that included 1:1 communication during planning meetings, involvement of key stakeholders in strategic planning processes, newsletters, and public forums. Community Enterprises uses regular staff and consumer "think days" to bring representatives from different offices together to plan for the organization.

Is the Executive Director the only person who can implement the change process?

Contrary to the stereotyped image of change occurring through a dynamic leader, middle managers played a significant role in shaping the change process for some organizations. This finding is consistent with observations about the role of mid-level change agents in the business literature. There is a need to strengthen mid-level and line staff as change agents in organizations. Leadership skills can be nurtured by encouraging middle managers to be conversant in changes in the field through membership in professional organizations, attending local and national conferences, and sponsoring discussion through journal clubs. Middle manager roles in the organization can be strengthened through breakfasts and other informal forums with organizational leaders, and by providing an aggressive internal training program.

What are some things that organizations should pay attention to as competitive employment outcomes are expanded?

It is imperative that consumers be involved in developing goals for the organization and share in the values that form those goals. Keep an eye on the prize. Be clear about the outcome the organization is seeking. In particular, be careful not to over focus on the process of change and organizational restructuring. While restructuring may be an important strategy, finding jobs for individuals is the primary goal. Remember the most critical outcome is consumer-driven employment with positive outcomes for the individual.

Develop and support change agents throughout the organization, since middle managers can play a critical role. Middle managers and direct service staff should participate in strategic planning, training, and other organizational development activities.

Focus on hiring staff that possess values consistent with the direction of the organization. People who understand the values of community employment can learn job development strategies, but a technically sound placement person who does not value individual choice and community inclusion is unlikely to learn those values. Support risk taking by staff to allow them to become more creative and empowered.

Questions regarding the research cited in this document should be addressed to:
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T-TAP

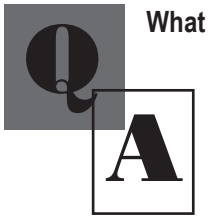
Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

January, 2005

Q & A on Customized Employment: Developing a Business Plan for Organizational Change

Developing a solid business plan is a critical step for Community Rehabilitation Programs (CRPs) who want to expand their agency's competitive, integrated employment outcomes. A business plan is not just a program plan and must focus on a number of key areas. This includes the agency's mission and intended program outcomes, the realignment of staff and funding, diversification of funding, marketing and linkages to employers, and collaboration and partnerships.

This fact sheet describes strategies that CRPs can use to develop a business plan for organizational change and is based on the experiences of Tri County TEC in Stuart, Florida. Tri County TEC is a member of the CRP Leadership Network that was formed by the Training and Technical Assistance for Providers project (T-TAP). The CRP Leadership network is providing training and technical assistance to other programs nationally who want to expand their agency's competitive, integrated employment options.



What are the specific components of a business plan?

The development of a business plan should begin by determining if the intended business is necessary. This can be done through research of community need, competition, and expertise. When planning for organizational change related to community-based employment outcomes, an agency must research the types of employment available in the community, find out who is already contacting businesses and their success rate. Then, look at the organization's reputation in the community, staff expertise, and resources available for increasing integrated competitive employment outcomes.

While there are hundreds of formats for business plans that can be found on the Internet, at the library, or through small business agencies, there are a number of core components that should be considered. Components include identifying the business and then setting goals, responsibilities, and the desired outcomes. The business plan also needs to define the targeted customer group for the organization. At Tri County TEC, the desired business was to expand the agency's focus on organizational change and community-based employment. The targeted customer group included people with disabilities, their families, funding sources, and the business community as their customers.

Planning and discussions with funders, community leaders, business owners and donors must be a part of the business plan and the financial planning process. Funding has become very complex during the past few years. Develop a business plan that includes staffing costs, other expenses, expected revenue, a break-even analysis and future expectations. Be creative, look to new avenues of funding and take this part of planning very seriously. Planning at this stage will determine an agency's ultimate success, and stakeholders at all levels must be involved.

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What is the first step in developing a business plan for organizational change?

The business planning actually begins with a demonstrated commitment by the organization to move its focus to community-based employment at a defined outcome level. Focus first on mission and intended outcomes. With business planning, start with the outcome, then work backwards on how to get there. There are many different models of business plans. It is better to start with a simpler business plan. Again, start with defining the intended outcome, not the processes. Attention to the steps necessary to accomplish planned outcomes comes next.

Clearly define the outcomes expected, for example specify the number of people who will find and keep jobs of their choice through ongoing efforts. Look at how many people a year and what strategies are needed to make sure those outcomes happen. Try to set a goal that is not too small but not so large that it cannot be accomplished.

Who are the critical staff and other stakeholders that should be involved in the development of a business plan?

Deciding who is included in the development of the business plan and the resulting planning process depends somewhat on the culture of the organization. However for a successful outcome, all who will be involved in the implementation of the plan should be involved in its development. The planning process at Tri-County TEC called for management to set goals for outcomes that were shared and developed with the rest of the staff, consumers, funding representatives and board representatives. A plan was developed, financial implications included, and then recommendations were made to the Board of Directors for approval and implementation. Implementation strategies should be developed with reports back to the board and funders on an ongoing basis.

How can staff become involved in the organizational change process?

In order to accomplish organizational change, staff need to own the process. An example of staff ownership can be drawn from the experiences of Tri County TEC. In moving from sheltered work to an organizational focus on community integrated employment, staff had to understand that individuals with disabilities have the same right and responsibility to work in the community as people who do not have disabilities. Tri County TEC used a value clarification process to help staff understand their own beliefs. This system started very broadly and ended up with the staff members having to commit to their place in the organizational changes process.

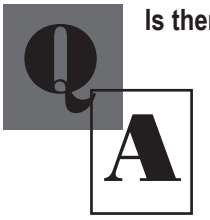
Staff members were asked to identify the consumers who could work in competitive employment. They were directed to ignore barriers to employment such as parental concerns, behavioral issues, transportation, and so on. They were asked to look at each individual and determine if he or she could work. Management anticipated that staff would say 25% of the organization's 175 clientele would be eligible for competitive employment. When staff returned with their estimate, they said that 95% of the individuals served were ready for employment! Trusting staff and allowing them to be a major part of the process.

Once the organizational direction is in place, what are the next steps in the development of the business plan?

The next step is to align staffing and funding with mission and intended outcomes. The business plan has to be based on consumer choice. Once it is known how many people desire community-based employment, a programmatic plan is needed that describes how many employment specialists are needed and how to fund needed employment supports, including ongoing supports. Identifying fiscal strategies for success are critically important. Look at what funding is available that supports community based employment outcomes. This process might involve a degree of negotiation with funding agencies. Funding should follow the individual and not be locked into program models that do not support consumer directed employment outcomes.

Work with funding agencies to take the funding and turn it into resources for the organizational change plan. Many states and funding agencies are moving to a more flexible "money follows the person" approach to support the most appropriate and preferred community settings for individuals with disabilities, including self-directed employment choices. Aligning funding with intended outcomes involves both

negotiation with existing funding agencies to potentially redirect traditional funding arrangements and diversification of funding to bring in new resources.

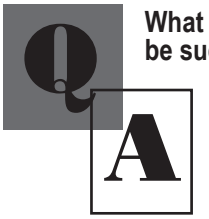


Is there assistance available to help support the development of a business plan?

There are a number of organizations that help with the development of a business plan. One helpful organization is SCORE, a nonprofit association dedicated to entrepreneurial education and the formation, growth and success of small businesses nationwide. SCORE provides entrepreneurs with free, confidential face-to-face and online business counseling. Experienced business volunteers offer counseling and workshops at 389 chapter offices nationwide.

In addition, local Chambers of Commerce, Economic Development Agencies, and the Small Business Administration are potential sources for assistance in developing a business plan. Twenty years ago, these organizations did not fully understand the importance of community rehabilitation programs in our communities. Today, with the focus on community-integrated employment, the perceptions are different.

Tri County TEC has been working with SCORE, the Martin County Business Development Board and the Stuart/Martin Chamber of Commerce in a number of different ways with internal planning. For instance, staff from Tri County TEC talk in terms of diversity, and how the agency can assist business to meet their obligations. This includes offering them qualified employees, creating diversity, and contributing to the overall economic fabric of the community. The intent is to give the agency a "business look" rather than a social service look.



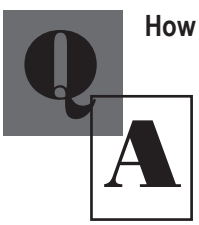
What are the keys to securing the funding needed to support the services necessary for consumers to be successful in competitive employment?

Funding is probably the most difficult part of organizational change, and it has to be the major focus in balancing with programmatic outcomes and integrity. In finding the balance for successful funding, the business planning has to be based on movement to community-based employment. It has to be consumer focused; outcome driven; based on relationships with funders; and focused on developing new funding sources and a diversified funding base. Continuing to focus on traditional funding sources with the exact same approach taken in the past will cause the change process to stall and eventually fail.

Diversification in funding is the key to success. Diversification of funding involves developing new funding sources and new populations. Tri County TEC was able to continue and move forward by identifying new funding sources, sometimes serving new populations such as the Welfare to Work initiative for TANF recipients. It is important to note that a number of the individuals in the TANF Welfare to Work initiative are individuals with disabilities. This actually assisted in helping cover some of the agency's overhead.

Develop positive relationships with funding source leaders and staff. Economic cycles and changes in funding policies have created a sometimes chaotic and uncertain relationship for community rehabilitation programs with funding agencies. One of the major keys in working through this period of uncertainty is the development of organizational credibility and positive relationships with key partner agencies. Speak the language of funding agencies and build credibility with them. Offer services that funding sources are willing to purchase based on the consumer driven approach that leads to competitive integrated employment.

Tri County TEC succeeded in expanding its service area from 3 to 11 counties, because funders recognized that the people finding jobs actually keep their jobs and in many cases move on to other jobs. Most important, the agency made sure that each person and each business had the support needed for success. With these results, Tri County TEC builds credibility by offering services that funding agencies are looking for and want to purchase.



How does an organization effectively market its services to the community?

The Business Plan must clearly define marketing strategies. Everyone in the organization must become a marketing expert when attempting movement to a focus on community-based employment. Each person has to know what the marketing strategies are, where the organization is trying to go, and why it's the right thing to do. Marketing is not an issue limited to just the board of

directors or management issue, to just direct service or support staff. It is an issue that has to be looked at throughout the entire organization. When developing a marketing plan, de-mystify the idea of marketing. Many staff members are afraid of marketing, because they think that "special" skills are needed to market. Marketing strategies must be clear and tailored to the organization. Remember the dignity of the people served, and have fun. Some ways to get the word out about the change in the organization is attending Chamber of Commerce meetings, making presentations to local government agencies, joining service clubs and business associations. Join! Join! Join! Encourage consumer participation with marketing efforts. Be a part of the community and not apart from it.

What are the potential pitfalls in the organizational change process?

The potential pitfalls need to be acknowledged in the business plan. For example, if moving from a facility-based program, the plan has to look at what to do with the building once the sheltered service has been substantially reduced or everybody has moved. Plan what to do if staff that do not want to become involved in the move decides to change jobs. The plan has to deal with those issues as well as how much money it will take to accomplish the planned organizational change.

Assuring that the planning process goes through staff as part of the business plan will help prevent staff from becoming deal killers in this effort. Management overviews the change process; staff makes it happen. Therefore, staff needs to be the drivers of the system. Also, parents first of all want safety, security and happiness for their sons and daughters. Experience and success stories in employment will help encourage parents to become an asset, not a liability, in the change process.

Backfilling must be prevented. Many organizations appear to think that as people move into jobs in the community, the only way they can continue to exist is to bring new people into the workshops. Find strategies that do not allow backfilling. Use strategies that allow for the downsizing of the center-based program and the elimination of the need for the building. Have a philosophy and a business plan that says priority will be given to every new student coming out of the school system that go directly into community-based employment. Move people off the waiting list into community jobs.

What are other important considerations in developing an effective business plan?

Develop relationships and collaborations with other organizations. Find the experts and use them. But don't just use the experts within our own field. Look at what business is reading. Go to a local bank president and ask: "What is the last book that you read on business organization and planning?" Buy it and then have staff use it. Go to the major businesses in your community and ask them the same question. Build a library not just with the books and the experts from our field, but also with the business experts. Find how to use the information to make sure that the agency fits into what business does.

Be creative and expand the agency's horizons, don't stick with the same old way of doing things. Talk to people in the field, in business, and to people in the community, find out what they are doing new in their business. Business is not doing things the same way that they did 20 years ago. Again, if organizations keep operating the same way, they will keep getting the same results.

Finally, celebrate success. Celebrate each consumer's success and each organizational success. Study the failures, study what didn't work exactly right. Determine what could have been done better or could have happened in a better way. But then celebrate those successes. Share the success with the family, the folks that you serve, board members, staff, and with the entire community.

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Information for this FAQ sheet cam from: T-TAP (Training and Technical Assistance for Providers)
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Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

September, 2004

Q & A on Customized Employment: Changing Staff Roles

Does your organization want to expand its employment options to include customized employment and downsize its facility-based services? If so, this shift may require a new or different way of doing business including changes in staff roles and job descriptions. In the process, staff may experience rapid changes in their roles, or sometimes these changes may happen slowly. In either case, staff will have questions about how a shift in providing services may impact the agency and their jobs. This is not unusual and a natural part of the change process. The following questions are typical ones that may be asked by staff when organizations work to assist individuals with disabilities in achieving customized employment outcomes.

Q

Should staff members expect a change in work assignments and their job descriptions if the agency expands its community-based employment program?

A

This will depend on a number of factors such as how staff members are currently spending their time, the number of individuals with disabilities who want to find customized jobs, as well as your current organizational structure and funding. If all staff members are supporting consumers in facility-based programs, and you do not plan on hiring additional staff, then some job descriptions should change. Typically, when using a customized approach to employment, job descriptions are created or written for employment specialists or job coaches.

Some staff may become specialists in particular roles, or your organization may take a more holistic approach to providing customized services. Using a specialist approach, an organization may identify one position to negotiate work opportunities with community businesses based on the specific interests and abilities of the job seekers. While another position is created to focus on providing job site support that an individual will need to become independent in the workplace. Or, staff job descriptions may be written using a generalist or holistic approach to include all aspects of assisting a job seeker in locating and maintaining a customized job.

Staffing configurations will be different from one organization to another. However, there is generally some commonality in the job duties for staff that will be assisting individuals with customized employment outcomes. The first essential job duty is getting to know the job seeker and his or her abilities, interests, work preferences and potential support needs. The second is meeting with employers to learn about their business needs and negotiating work opportunities that highlight the skills of the job seekers. The third is facilitating and providing workplace supports both on and away from the workplace. The fourth is providing on going / follow-up supports to assist the individual in maintaining employment.

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Our organization's hours of operation have always been 8:00 a.m. to 5:00 p.m., Monday through Friday. Staff members have been asking if there will be changes in their daily schedules and if so what?

While an employment specialist may expect to work the same number of hours in a week, it is almost certain that staff members' schedules will change. In addition, the location of services will shift from facility-based to community-based. A customized employment approach requires doing business at times and places that are convenient for those served; both individuals with disabilities and employers. For example, a staff member may need to meet job seekers with disabilities in their homes or other community locations to learn about their personal abilities and potential support needs. Or, staff members will need to meet with prospective employers at their businesses and at times convenient to them.

Once a customized job has been identified, it may mean that the individual is employed but not necessarily from 8:00 a.m. to 5:00 p.m., Monday through Friday. Individuals with disabilities will have various preferences about where they would like to work as well as the time of day. Other factors may impact their work schedule such as when transportation is available to and from the workplace. Every business will have its own scheduling needs as well.

Sometimes, a negotiated work schedule will fall within a typical work week, and at other times it will not. Staff may be expected to provide services early in the morning, later at night or on Saturday, Sunday, or any other day of the week. Staff availability and flexibility will be essential to providing customized employment services. An employment specialist's schedule will change as the workers' with disabilities schedules change.

An organization must develop policies and procedures to ensure that both their consumers as well as personnel get what they need. For instance, some employment specialists may actually prefer night or weekend work or like getting paid extra to do so. Others may only want or be able to work during specific hours. Each organization will have to decide on the best staff configuration for them and make sure that job descriptions reflect these policies and procedures. Temporary and part time staff members might be considered to provide flexibility in providing supports when and where an individual wants them. In addition, individuals with somewhat inflexible schedules may be better suited to provide employer marketing and job negotiation services, while others who have more flexibility provide on the job support services. Ultimately, staff must be committed to providing support to individuals with disabilities during the hours and days of the week that customized jobs are available.

Several staff members have wondered if a change in job description will mean a raise in salary? Should they expect a raise?

This decision will ultimately be up to the organizations leadership. Staff may receive higher hourly wages, performance-based compensation, or a salary with benefits. There is no current research available on average salaries for such personnel. Sometimes, benefits can offset lower salaries, depending on the applicant's situation. For example, single people may be interested in educational reimbursement, while seniors will want to know about retirement benefits. There is no doubt that the best way to ensure the future of customized employment is to have well trained personnel who earn a decent wage. It is also important to remember, that lower salaries could be indicative of devaluing the service offered and the role of the employment specialist. However, in the end the salary range established for the position will depend on the organizations' resources.

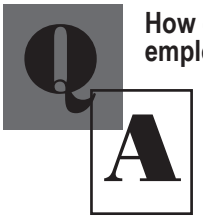
What can an organization do if some staff members are not "on board" with the organizational change?

This may stem from fear related to lack of information about what is occurring within the organization. Keep in mind that people change when they are pursuing their own goals! Management must involve staff in setting the goals and objectives for change and communicate regularly. This includes beginning with a clear mission statement and set of values for your organization.

If some staff members lack enthusiasm and have down beat attitudes, a barrier can be created. You can help in a number of ways. Begin by providing leadership and being excited and up beat. Stay focused and keep positive. This can take your organization a long way! Also, acknowledge

potential fears and apprehensions by encouraging personnel to raise concerns and comment openly. If concerns are not voiced, consider anonymity. For instance set up a "concern box" where staff can anonymously raise their questions and receive answers.

Keep staff up-to-date and provide the information they need to understand the change process. Realize that staff may not have the knowledge needed to facilitate customized employment outcomes. For instance, they may have always believed that individuals with disabilities are best supported in facility-based settings. Staff may not realize that customizing a job to an individual's interests and abilities and providing training many of the barriers that have prevented employment can be overcome. Share stories that showcase workers' with disabilities successes in the workplace. Provide support by listening to staffs' concerns and help them to be in-formed about the positive aspects of customized employment. Remember, people do not change because they are told to do so. However, conditions can be created that allow people to develop their personal and shared visions for the organization.



How can my organization shift its staff resources from facility-based services to customized employment?

Identifying another agency or organization that has been successful in moving staff resources from one program service to another might be one place to begin. Another first step might be to determine how staff members are currently spending time within the organization and identify ways that this could change. T-TAP has developed a Staff Time Log that provides a snapshot of staff time investment. This form can be downloaded by going online to the following URL: http://www.t-tap.org/strategies/change/stafftimelog.doc

The Staff Time Log can be used to answer questions such as, "are we shifting resources from facility-based services to community support over time," "are we investing enough in job development," and so forth. The Staff Time Log is completed for one full calendar week by all staff, with the possible exception of staff that has purely administrative roles (e.g. the business manager or receptionist). Staff members indicate the primary activity for each 30-minute interval during the day. Ideally, they should complete the form as the day goes on and memories are fresh.

An agency needs to be sensitive to staff concerns about using this tool. Depending on the organizational culture, staff may be allowed to complete the form anonymously. This may be done either by returning Logs directly to an external evaluator or by having staff hand them in without identifying themselves. The goal is to look at resource allocation, not individual staff performance, to determine how these resources might best be allocated for facilitating customized employment outcomes.

What training will staff need to be able to provide customized employment?

Many staff members will find that they already posses much of the knowledge and skills needed to succeed. What they do not know or cannot do they can learn through staff development activities such as workshops, readings, discussions with seasoned personnel, and practical field-based experience. Staff development usually focuses on three interrelated areas of performance: attitudes, skills, and knowledge.

Basic thoughts about the ability of people with disabilities to work, their right to make decisions, and take risks are examples of attitudes that may affect staff performance. Staff members must have or develop the belief that all individuals with disabilities are capable of working, making choices, and contributing to their communities. Staff members who are in agreement that customized employment is a good thing are already on their way to successfully supporting individuals with disabilities to achieve inclusive employment outcomes.

Staff members who do not believe in customized employment strategies are not likely to be successful. For example, an employment specialist may be very savvy at meeting with businesses, but if he or she does not believe a job can be negotiated for a person with a significant disability, the desired result of a job offer most likely will not occur. Staff must also understand the mission of their organization. Those who embrace the goals of the program and shared vision will be committed to success.

Knowledge relates to a workers' ability to understand how they are to perform certain tasks. This assumption is that given proper input, support and resources employment staff will know what to do effectively to perform their jobs. Skills refer to being able to apply one's knowledge in a given situation. For example, an employment consultant may understand the recommended way to ap-proach job negotiations after listening to a lecture, but lack the confidence to follow the rec-ommendations when meeting with an employer. In this scenario, the employment specialist has the knowledge and motivation to negotiate a work opportunity, but she requires skills develop-ment to be successful.

An organization will need to take the steps necessary to ensure that staff gain the knowledge and develop the skills needed to carry out the core responsibilities for facilitating customized employment outcomes. Make sure that staff members understand the organization, its mission, values, history, structure, and interfacing of various divisions along with their role and responsi-bilities. Assist staff in acquiring the necessary knowledge and to develop a vast array of skills. This includes those skills associated with time management, effective communication, creative problem solving, removing barriers to employment, identifying job seeker strengths, abilities and support needs, promoting choice and decision making, connecting with and building business relations, negotiating creative work structures, and providing or facilitating employment supports. Support staff and assist them by formulating staff development plans that have clear action steps. Provide positive feedback as they move into their new roles and responsibilities. Cel-ebrate their successes as they assist individuals in achieving customized employment outcomes.

We still need to hire new staff. Do you have any recommendations?

When hiring employment specialists, managers may gain the best insight about a candidate's attitudes, knowledge, and skills by asking behavior-based questions. One way to derive a list of interview questions is to start by reviewing the job description and selection criteria. Responses to behavior-based questions reflect what the person might do in a similar situation. Here is an example of a role-play situation and associated interview questions.

KFI (Katahdin Friends, Inc.), who is a member of T-TAP's CRP Leadership Mentor Network, recommends the following when hiring new staff:

- Hire people for their values, rather than their experience, certifications, or degrees.
- Hire people from the same community as the people supported.
- Hire people who can describe how they are connected to their communities.
- Hire people that are knowledgeable about their community and its businesses.
- Involve people with disabilities and family members in the hiring process.
- Ask, "Is the person someone that we could stand up and cheer about?"
- Please visit T-TAP at http://www.t-tap.org to read more about their experiences with changing staff roles.

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Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

October, 2004

Q & A on Customized Employment: Staff Development

Customized employment requires a high level of commitment and skill from the staff that provide employment supports on a day-to-day basis. The job title for these employees may vary and include employment consultant, employment specialist, and job developer or job placement specialist. Some Community Rehabilitation Programs (CRPs) may re-allocate resources and staff from facility-based programs to expand their customized employment services. These individuals may need to develop a new set of skills and values that are very different from direct support roles within the facility-based program. This change may be stressful or even frightening for staff members who are used to working in more controlled settings. This fact sheet discusses strategies that an organization can use to ensure that employment consultants share the same mission and values for promoting competitive, community-based, integrated employment options.

Q **How does having a shared organizational mission and values impact customized employment outcomes?**

A Unlike more traditional models of facility-based services, employment consultants that support individuals in competitive jobs function with a high degree of autonomy. They often spend very little time in contact with supervisors and co-workers. Instead, they work independently in constant interaction with job seekers, family members, employers, and members of the community at large. Employment consultants need to be able to articulate and apply the organization's mission and values in day-to-day situations. At the same time, their impact on the quality of the employment relationship between individuals with disabilities and their employers in the community is very high. A consistent shared understanding of the organization's mission and values is critical to ensure that decisions made by employment consultants are consistent with organizational standards and goals.

Q **How does an organization establish consistent shared values among its staff?**

A Establishing shared values requires that an organization anticipate and directly discuss staff questions and concerns, educate staff on current research, and share promising practices. CRPS must spend dedicated time focusing on vision and values that promote competitive, community-based, integrated employment options, to ensure that staff members have a clear understanding of the direction that the organization is heading. This includes time with the staff talking about the agency's mission and how the mission translates into operational goals. Organizations also need to evaluate policies and departmental or team practice and activities to ensure that practice follows from the desired values. Ask, "Do our policies and practices hold to the stated mission?"

Organizations have built values and mission in a variety of ways, but it is clear that building shared values requires a clear and focused investment of organizational resources. An organization could define its commitment to community-based services by identifying specific goals or values. As an example, this could include the following:

1. The organization would only provide individual placements.
2. Placements would be within the competitive market.
3. No placements would be at sub-minimum wage.

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4. Admission into the organization's program would be zero-reject.
5. The organization would continue to provide follow-up and career development services to individuals once they became employed.

Noble of Indiana, a member of the T-TAP CRP Leadership Network, implemented a new service model that built all supports using a detailed person-centered planning process. Staff took a holistic approach to building integrated opportunities for employment, recreation and leisure, and continuing education for the customers in the program. In addition to traditional skill training, staff members were assigned a wide range of values-based reading materials to include disability services, human rights, and business practices. Readings were discussed at weekly meetings.

What is the T-TAP (Training and Technical Assistance to Providers) CRP Leadership Network?

A core group of ten providers comprise T-TAP's CRP Leadership Network. This group of providers are recognized for either having converted their programs from 14 (c) certificates or have made substantial gains in doing so. Staff members from these agencies are serving as Mentors to other CRPs that are interested in advancing customized employment outcomes for the individuals supported by their organizations. To learn more about T-TAP's CRP Leadership Network, please visit http://www.t-tap.org.

What strategies help motivate and inspire staff to work toward the desired outcomes?

Organizations need to measure what they do! Set outcome objectives and measure performance for the organization and for individual staff so that each person knows what the expectations are. Identify performance outcome objectives collaboratively with staff and develop a work plan that outlines activities, timelines, resources, and responsibilities. Finally, it is helpful to produce reports with outcome data. These documents can quantify how things are going with concrete information on number of interviews, jobs, and so forth that occur monthly. Incorporate a continuous quality improvement approach by having each employment consultant develop learning and self-improvement objectives, approaches, and strategies.

Another T-TAP CRP Mentor agency, RISE, Inc., approached issues of inertia at their agency by implementing self-directed teams. These self-directed teams provided an opportunity to build staff ownership of RISE's new priorities as it expanded customized employment. RISE also found that a self-directed team model allowed staff to share the risks and rewards of the new focus on competitive employment, and to share the workload and resources. Finally, self-directed teams nurtured new leadership for the organization and provided a focal point for celebrating success.

What if staff are resistant to implementing customized employment?

Whenever organizations make changes, it is inevitable that people will be worried, fear the change, and possibly be resistant. Change is difficult. Here are some suggestions for agencies needing to address staff concerns. First, know what the opposition arguments will be. Take time to explore the potential concerns of staff, and address those fundamental questions before they are raised. Anticipate core concerns (funding, transportation, and so forth) that could be raised. Think these through ahead of time and be prepared with responses. Next, educate staff about research and practice in the field. Tell them what is and is not working. This sharing of promising practices provides direction for staff. Finally, sharing the successes of the agency in placing individuals in customized community employment builds morale and encourages staff members to keep striving for success.

How do employment consultants systematically build skills to implement customized employment strategies?

Organizations need to implement strategies that clearly identify and catalog the skills that each position requires. Then, they need to systematically plan for an array of intervention and assessment strategies to ensure that staff possess and use those skills. RISE, Inc. used several approaches to redefine staff roles and develop an individualized approach to skill development. This included conducting an agency-wide survey of critical skills and training priorities, reworking job descriptions, and implementing a cross-functional team to review job roles and priorities.

The revised job descriptions resulted in the development of a detailed job skills inventory for each position. The job skills inventory became the basis for Individual Staff Development Plans including an overall agency staff development plan. The job inventory is organized around job functions, competencies/skills, a priority ranking, and documentation of skill mastery. There is a development plan for each job function. This provides the organization with a systematic approach to planning training needs and monitoring individual staff development. Sample job functions and competencies from RISE Inc.'s Job Skills Inventory for a Job Placement Specialist include the following examples.

Sample Job Placement Specialist Job Functions and Competencies

- Job Function (What I do) -- Facilitate meetings with participants and career planning team.
- Competency/Skill (What I need to know) -- Understand staff meeting protocols and document decisions made.
- Job Function (What I do) -- Support participants with budget & financial planning.
- Competency/skill (What I need to know) -- Understand SSI, SSDI, SSA work incentives & other government income maintenance programs.
- Job Function (What I do) -- Contact employers & provides job development services.
- Competency/skill (What I need to know) -- Become knowledgeable about job development methods and strategies.
- Job Function (What I do) -- Coordinate fiscal work incentives for employers.
- Competency/skill (What I need to know) -- Understand how to arrange OJT & WORTC options.
- Job Function (What I do) -- Provide ADA training & technical support for employers.
- Competency/skill (What I need to know) -- Understand ADA provisions & compliance factors.
- Job Function (What I do) -- Coordinate and/or offers training and related support for participants placed on the job.
- Competency/skill (What I need to know) -- Become knowledgeable about natural supports & job coach training methods. Understand workplace support strategies.
- Job Function (What I do) -- Coordinate job placement services with workforce centers and other partners.
- Competency/skill (What I need to know) -- Become knowledgeable about job networking techniques.
- Job Function (What I do) -- Coordinate services with other career planning team members.
- Competency/skill (What I need to know) -- Understand the role of the vocational rehabilitation agency, county social services, secondary education, and other representatives.

What strategies can an organization use to support continuous learning and self-improvement?

There are a number of strategies that can be used to support staff learning and self-improvement as well as organizational change. One of the best ways to incorporate new service delivery ideas is by visiting organizations that are known to be running unique or exemplary program services. Tour other programs, meet with their employment consultants, view direct service strategies or methods in action, and examine the benefits and outcomes that these programs produce for consumers.

Pre-service training or orientation programs are used by community rehabilitation agencies to support the learning needs of new employees as well as introduce them to their agency. The first step, is to involve each person in his/her plan. Adults learn best when they can identify their own goals and objectives.

Some employment consultants may benefit from maintaining journals to record information about their job performance and professional experiences. These self-appraisals offer opportunities to record information about their perceived skill development needs, technical issues that they encounter on the job, or new learning experiences needed to enhance job performance. A journal is especially helpful to new employment consultants who are learning their job. It provides a record of discussion points for future reference and meetings with supervisors.

Educational or training strategies that have an interactive or experiential component may be the most beneficial to employment consultants learning new or advanced direct service skills. These can be formal or informal relationships with skilled mentors and offer employment consultants expert guidance and

encouragement concerning the knowledge and skills needed to reach their full potential as practitioners. The objective is to provide guided work experiences, role modeling, and expert coaching so the introduction of essential knowledge and skills are mastered to desired levels of proficiency. One way to accomplish this is to encourage job shadowing for new employees with experienced employment consultants within the agency.

Another T-TAP CRP Mentor Agency, Cobb / Douglas Community Services Boards, recommends that staff identify group reading such as professional journal articles, books, or other publications. The agency sets aside time from staffs' busy schedules to read book chapters, publications, and newsletters that feature timely articles, emerging research, and current information vital to customized employment practices. Then, they meet as a group to discuss the implications for their agency's service delivery.

An agency might choose to establish a staff development and training committee. Staff development committees are often charged with identifying the agency's staff training needs and implementing action plans based on budgetary constraints and a consensus about priorities. Again, it is important to include the individuals who will be receiving training in the design and identification of the topics.

Where can an organization go to find training for its staff?

T-TAP offers a number of distance learning opportunities that are available at no charge or for a nominal cost at http://www.t-tap.org. Recognized leaders in facilitating customized employment outcomes are producing the information, and staff can log on and hear the presentations any time at their convenience or live at a pre-arranged schedule. Distance learning provides exciting opportunities for employment consultants who are interested in continuing education but unable to leave their jobs for an extended period.

Agencies also may look to their local community colleges to find adult education programs that meet staff training needs. Employment consultants may enroll in adult education programs as part of an individual development plan for a number of reasons. First, they may use these programs to continue their career ladder progress towards a longer-term career objective. Second, they may address immediate skill development needs to improve job performance. Third, employment consultants may acquire advanced level practitioner skills and increase their performance to the highest levels possible.

There are 10 regional Rehabilitation Continuing Education Programs (RCEPs) in the U.S. dedicated to the training and staff development needs of employment consultants. These specialized RCEPs for employment consultants are in 10 regions of the country. The primary audiences for these regional RCEPs are direct service, supervisory, administrative, and volunteer staff from community rehabilitation agencies that are involved in obtaining and supporting participant outcomes. An online search can provide more information on where these programs are located or go to http://www.nchrtm.okstate.edu/resources/rcep.html for a listing and contact names.

Many organizations report the intrinsic value of national and state conferences as well as local workshops as a means for staying current with colleagues and leading edge practices in the field. Although it 's difficult to find budget resources or time to attend staff development conferences, they are absolutely crucial to employment consultant learning and must be encouraged by their rehabilitation agencies. Short-term conferences and workshops tend to energize employment consultants with new ideas and encourage infusion of leading edge practices in their daily work.

Information for this FAQ sheet came from: T-TAP (Training and Technical Assistance for Providers)

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Information for this FAQ sheet came from: T-TAP (Training and Technical Assistance for Providers)

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Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

July, 2005

Q & A on Customized Employment: Funding of Community-Integrated Employment Outcomes

Nationally, participation in facility-based programs continues to exceed participation in community-integrated employment by individuals with significant disabilities. However, a number of community rehabilitation programs (CRPs) have evolved their services to primarily focus on funding supports to individuals in community-integrated, inclusive employment settings. Funding is matched to support an individual's customized employment outcome rather than being used primarily to maintain facilities.

This fact sheet will provide information on how to use a diversified array of funding resources to support community-integrated employment outcomes. Ms. Nancy Brooks-Lane, Director of Developmental Disabilities Services, Cobb-Douglas Counties Community Services Boards in Georgia, provides detailed examples of how to target and use a variety of funding opportunities for this purpose. First, Ms. Brooks-Lane discusses how her organization decided to shift its focus from facility-based programs to community-integrated outcomes. Then, she answers frequently asked questions about how the organization funded this change using multiple resources.

When and how did Cobb-Douglas Counties Community Services Boards begin to focus on assisting individuals with disabilities to achieve community-integrated employment outcomes?

In 1999, Developmental Disabilities Services of the Cobb-Douglas Counties CSBs, two Boards that work together under the same administrative umbrella, operated four sheltered workshop programs. The state funding streams reinforced facility-based services, meaning that funds were allocated to maintain individuals in day activity and sheltered work programs. Most of the participants' parents were elderly and did not want changes to be made in the service system. Additionally, several of the staff had worked in the programs for many years and were more comfortable with the facility-based model. At that time, shifting from a sheltered workshop to community-based supports was not a priority for the Boards. As a result, previous attempts at change had been minimally successful.

In the fall of 1999, the CSBs hired a new Chief Executive Officer who supported innovation and moving the program to a community-integrated approach to services. At that time, the change process began in earnest, which underlines the importance of leadership support for the implementation of significant organizational change. Sub-minimum wage contracts were phased out.

The organizational change effort was driven by the values of community integration and self-determination for individuals with significant disabilities. Individual or small group meetings were held to involve families and advocates in the change process. Many families were not in favor of the plans and for about six months struggled with the idea. These struggles presented themselves through a range of behaviors from productive discussion to personal attacks. The values of community integration and self-determination were returned to frequently as a guide for problem solving, decision-making, and moral support during those first difficult months.

Realigning the mission of the organization was key in moving to a focus on funding community-integrated employment. During the summer of 2002, a business plan was sent to the local funding board from the leadership of the Cobb-Douglas Counties Community Services Boards. This document contained the following value statement: *We will concentrate efforts on service/support delivery that maximizes each individual's op-portunity for inclusion, both socially and professionally. Consumers will be provided with the tools to compete for employment, including white-collar jobs, in their respective communities.*

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Were there any key activities that Cobb-Douglas Counties Community Services Boards implemented during the organizational change and staff development process?

During the organizational redesign process, staff focused on four key activities. The first was an emphasis on self-examination that challenged our attitudes and practices that were potentially devaluing or judgmental. The second was an emphasis on the values represented in our program and services. Individuality, choice, respect, participation, competence, social inclusion, community settings, and employment became the focal point with the individuals in our program who are our "customers." The third activity was attention to restructuring and strong leadership that resulted in the flattening of the organizational structure, having all staff being involved with customers. A value-based culture of creativity was developed. The final focal point was staff training to create new skill sets with an emphasis on person-centered planning, a team focus, natural supports, mentoring, internal vs. external motivation, seeing new possibilities, valued roles, and making a difference. Self-directed work teams were formed with staff assuming more generic roles. Employment and the principles of community inclusion were our guiding light. Goal development was customer driven and determined by the individual's passions. Person-centered planning determined how staff turned these passions into customized employment outcomes.

What are funding options that are potentially available to align dollars and other resources with the focus on community-integrated employment outcomes?

Vocational Rehabilitation, One Stop Career Centers, and provider agencies that support individuals with a disability are generally familiar resources. One resource less familiar to some is the Micro Enterprise Center. These Centers started out as a grass-roots economic development initiative. In Georgia, United Way, as well as other foundations and endowments such as Hewlett-Packard, which funded a computer lab for our Micro Enterprise Center, fund Micro Enterprise Centers. Micro-loans can be provided by these Centers and are in the neighborhood of $2,000 to $3,000, but certainly can vary. These Micro Enterprise Centers vary from state to state, so it is important that people get to know how a Center operates in their own state. Some of the other financial options that Cobb-Douglas Counties CSBs have used include:

- Provider Short Term-Loans
- Individual Training Accounts and Individual Development Accounts
- PASS Plans
- Family Contributions

Can you provide an example of using a no-interest micro loan to fund a customized employment outcome?

Diane's story is a good example of using a no-interest micro loan and an Individual Development Account. She wanted to start her own salon. With the start-up funds from the micro-loan she accessed through our agency, Diane began the process of building her business, Hair Designs by Broadway. She also used an Individual Development Account through the Micro Enterprise Center. Diane saved $500, and the Center matched these dollars 2 to 1, resulting in an additional $1,500 for her to put towards her business. Diane was very creative in purchasing supplies for her salon. She used thrift stores and contacted salons that had gone out of the business to purchase supplies, saving a lot of money by her smart shopping. Diane got the magnetic business sign to go on her car, so wherever she is, she advertises her business.

Could you provide more information on what you mean by provider short-term loans?

Provider short-term loans are an option that our organization has begun to provide to assist our customers with start-up costs. The loans come from donated funds, flexible dollars, and/or endowments and foundations. Cobb-Douglas Counties CSBs have provided loans to individuals with disabilities to start their business or to purchase a resource. The loans generally total $1,000 to $3,000, and there is no interest charged to the person. Our customers pay back the loans over a period of time, usually 18 to 24 months. These loans give more flexibility to the customers to be able to get what they need to achieve the out-comes that have been identified as their goals.

Our program has provided loans to five individuals. An example of a business supported through the short-term no-cost loan is an individual who received a loan to have the Georgia driver's manual translated into Spanish. That was a resource lacking in the State, and Georgia has a growing Hispanic com-

munity. Loan funds were used for supplies and for printing the translated manual. One individual started his own synthetic oil business; another started a lawn care business. Loan funds were used to purchase start-up supplies and equipment needed to operate the businesses.

How can an Individual Training Account or Individual Development Account be used to fund a customized employment outcome?

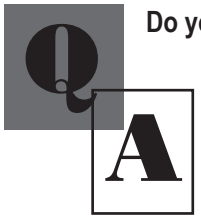
Individual Training Accounts (ITAs) are available through One Stop Career Centers to provide funding for educational or vocational training. Individual Development Accounts (IDA) are a potential funding resource many people do not know much about. They are special savings accounts designed to assist low-income people on their path toward asset ownership through matched savings and financial education. Our program has utilized IDAs to support employment for five individuals in their businesses such as child care, on-line shoe retail business, a home inspection business, and an IT repair and retail business. IDAs are a matched-funding financial option, so an individual who is going to access an IDA must have some funds to use for the match requirement. In Georgia, IDAs were funded under United Way and now are under our micro enterprise center called the Edge Connection. Some Banks and Credit Unions also offer this option. More information is available at the following Website: http://www.alternatives.org/ida.html

Do you have an example of someone who has used an Individual Training Account through a One-Stop Career Center?

Edward is an example of a person who used an Individual Training Account through the One-Stop System to fund his employment outcome. During his vocational profiling process, staff learned Edward had a very strong interest in personal training and had a connection to a particular gym. So, we used that connection. This is a very good example of how social capital can be a very important employment resource. Edward already had this connection with someone who has a career as a personal trainer. So with the support of an educational coach, he went through the training to become a personal trainer. His training was purchased through the One-Stop system, using funds from an Individual Training Account (ITA). Based on the informational resources provided through Edward's personal trainer and the money for him to attend training, staff is now working with a local gym to customize a personal training position.

Do you have any other information on how to creatively use funding?

Plans for Achieving Self Support (PASS) for recipients of Social Security Disability Benefits are another option. Funds can be set aside within a PASS plan to pay for services and resources needed to achieve an employment outcome. Also, our program has begun to encourage families with youth in middle school and high school to start an employment fund for their family member with a disability, much like a college fund. We have just started discussing this concept with families, and so far, families have responded well. Finally, donated funds are a potential resource. For example, churches are wonderful repositories of resources and social capital that can open doors for individuals with disabilities. These are some of the types of diverse funds that we have been able to work with customers in achieving employment outcomes.



Do you have an example of a customized job that was funded by Vocational Rehabilitation?

Bill's situation is an example of how working proactively with a funding source such as Vocational Rehabilitation to achieve a creative employment outcome can result in a positive change in policy and practice. Bill wanted to work outside in a naturalistic setting, after much community-based assessment, the employment option identified with him was a catfish catch-and-release or catch-and-keep pond stocked by the owners. Staff found there was a void for someone to process the fish. Funding for the various pieces of equipment needed to assist Bill in realizing his employment goal came from braiding together resources from a U.S. Dept. of Labor Customized Employment Grant and State Vocational Rehabilitation Services.

Vocational Rehabilitation provided the scooter that Bill uses for mobility and to access the grounds of the fishing hole. VR also made the processing workstation easily accessible for Bill, as well as the tools to keep it clean hygienically. The employer provides on-site employment supports that he might need in addition to further training on the fish-cleaning process and use of the equipment. In exchange for these supports, the employer has Bill's approval to utilize his equipment when he is not working there.

Bill was able to bring to this business state-of-the-art fish cleaning processing equipment, a good example of resource ownership as a customized employment outcome. Customers of the pond bring their catch to Bill for him to process. Bill's equipment and service adds value to this business. Many customers are choosing to come to this particular fishing hole, because many of the other ponds in the area do not offer the processing service. Bill's employment outcome helped convince VR that resource ownership is an employment option that VR funding could support. VR in Georgia now offers resource ownership options for individuals with disabilities under the tools and equipment section of their policies and procedures.

Summary

All too frequently, funding decisions within and by community rehabilitation programs are driven by perceived programmatic needs. Funding decisions must be driven by the individual community-integrated employment goals and support needs of participants in the CRP. The Cobb-Douglas Counties Community Services Boards provide an excellent example of how funding can be successfully redirected within a community rehabilitation program to accomplish a singular outcome, community-integrated employment.

There are a number of critical factors within the design of community rehabilitation program that influence the extent to which funding can be re-directed to achieve community-integrated employment outcomes. These organizational change factors include, for example:

- The CRP must commit to an organizational priority on achieving competitive employment outcomes, including customized employment.
- This commitment sets in place an organizational focus driven by a clear mission that directs program resources, including funding, on participants achieving competitive employment outcomes.
- This mission-driven effort involves the program's Board, administration, staff, and consumers. Staff and programs are aligned to support this mission.
- A diversified funding base is developed, and funding is aligned to support the mission and focus on integrated customized job outcomes.
- Business and industry become a partner and a customer.
- The consistent thread running through these efforts is the self-determined, informed goal of each individual served, including addressing the questions and concerns of family members.
- For funding to be directed to achieving community-integrated employment outcomes, organizational level change strategies must be linked and fully complement each other.

References

- Brooks-Lane, N., Hutcheson, S., & Revell, G. (2005). Supporting consumer directed employment outcomes. Journal of Vocational Rehabilitation, 23(2), 123-134.
- Butterworth, J. & Fesko, S. (2004). Successful organizational change. Richmond, VA: T-TAP, Virginia Commonwealth University, RRTC. Available at: http://www.t-tap.org/strategies/factsheet/successchange.htm
- Butterworth, J., Ghiloni, C., Revell, G. & Brooks-Lane, N. (2004). Creating a diversified funding base. Richmond, VA: T-TAP, Virginia Commonwealth University RRTC. Available at: http://www.t-tap.org/strategies/factsheet/diversifiedfunding.html

Resources

The T-TAP project has developed a series of Fact Sheets available on-line that focus on the individual primary factors influencing how funding is targeted within a community rehabilitation program. These are as follows:

- Hutchinson, S. & Revell, G. (2005). Developing a business plan for organizational change. Richmond, VA: T-TAP,Virginia Commonwealth University RRTC. Available at: http://www.t-tap.org/strategies/factsheet/developingbusplan.htm
- Inge, K. & Targett, P. (2005). Addressing parental concerns. Richmond, VA: T-TAP, Virginia Commonwealth University RRTC. Available at: http://www.t-tap.org/strategies/factsheet/parents.htm
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For more information on T-TAP, please visit: http://www.t-tap.org

T-TAP

Virginia Commonwealth University & The Institute for Community Inclusions, University of Massachusetts, Boston

Q & A on Customized Employment:

Addressing Concerns Related to Losing Social Security and Health Care Benefits

T-TAP conducted a national survey of Community Rehabilitation Programs asking their opinion regarding what factors maintain subminimum wage employment for individuals with disabilities. Specifically, respondents were asked their opinion on the following statement: "Fear of losing benefits such as SSI, SSDI, and/or other health care is one of the primary reasons individuals in subminimum wage programs / 14 (c) programs do not want competitive jobs." Of the agencies submitting a reply, approximately 59% agreed with this statement; 32% disagreed, and 9% expressed no opinion.

Considering that almost 60% of the respondents felt that loss of benefits is a barrier to employment, individuals with disabilities, their family members, and community rehabilitation staff need accurate information and guidance on the potential impact of earnings on benefits. This fact sheet will address common questions regarding how work in an integrated community job may impact an individual's benefits. Readers are reminded that the impact of work on benefits varies on a case-by-case basis.

Q

How does an individual qualify for Supplemental Security Income (SSI)?

A

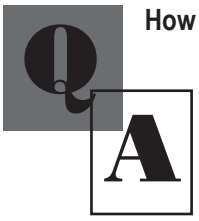
In order to receive SSI, an individual must meet two important criteria. First, the person must either be disabled, as defined by the Social Security Administration (SSA), blind, or 65 years of age or older. According to SSA, an individual is disabled if they are unable to earn more than a specified amount of money per month due to their disability. In 2007, this figure is $900 and is referred to as Substantial Gainful Activity (SGA). Second, SSA defines disability as individuals who have significant long lasting impairments. The person's disability must be expected to last more than a year. This definition is meant to rule out people who are injured for example in a car accident and are unable to work because of those injuries for a month or two.

In addition, individuals must also meet an income and resource test. Basically, Social Security needs to know how much money the person already has to meet living needs. The first part of this "test" looks at an individual's income. They look at how much the individual earns if they are working. If the amount is more than the current SGA, the person will not be found eligible. This means that the individual is able to work at a substantial level and does not need the assistance of an SSI check. Social Security not only looks at earned income but also unearned income. Unearned income includes things such as Social Security Disability Insurance (SSDI), Veterans Benefits, life insurance proceeds, support and alimony, workers compensation, and unemployment compensation. These benefits and income will affect whether or not an individual is eligible for SSI.

The second part of this "income and resource test" looks at the individual's resources. If an individual has more than $2,000 in resources, he or she will not be eligible for SSI. Resources include anything that an individual can change to cash and potentially use to pay for food or rent. Some examples of resources include cash, savings accounts, stocks, land or personal property. There are some "resources" that Social Security does not count. Some examples of these include: the home the person lives in and the land the home is on, household items such as furniture, burial spaces for the individual and the immediate family, and one car.

The Office of Disability Employment Policy, U.S. Department of Labor | Virginia Commonwealth University | Institute for Community Inclusion, University of Massachusetts, Boston

As one can see, SSI is a benefit that is meant for individuals who have very little money whether it is from work or savings. SSI is meant to help people have just enough money to be able to afford somewhere to live and to buy food. Someone that is only receiving SSI and has no other source of income is living below poverty standards.

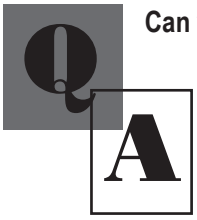


How does an individual qualify for Social Security Disability Insurance (SSDI)?

In order to qualify for Social Security Disability Insurance, an individual must meet three requirements. First, the person must be disabled--Social Security uses the same definition of disabled for SSDI as it does for SSI. The second requirement that must be met in order to receive SSDI benefits is the individual cannot be working or is earning less than Substantial Gainful Activity (SGA). Remember, as with SSI, Social Security says that individuals who earn over $900/month (in 2007) are performing SGA. When earning $900 or higher, an individual's disability is not significant enough to affect their ability to work.

The last requirement that needs to be met is the individual must have insured status. This means they have worked in the past and have paid into the Social Security system through Federal Insurance Contributions Act taxes (FICA). To become insured, an individual must pay FICA taxes and accrue what are called "credits". The number of credits a person needs to become insured varies from individual to individual. This depends on the person's age and when he or she was determined disabled by SSA.

SSDI eligibility is not based on whether or not a person needs it financially. There are no restrictions on unearned income or resources as there are with SSI. The amount of an individual's SSDI check depends on how much FICA taxes have been paid over that individual's work history. This will vary from person to person.



Can you explain the difference between SSI and SSDI?

There are several differences between SSI and SSDI. The first difference is that SSI is based on whether or not an individual needs the additional income in order to pay for food and rent. SSDI is a benefit that people pay into like other insurance programs. This difference is apparent in the eligibility process for each. For SSI, Social Security considers all of the income the person has (wages, other public benefits, bank accounts, etc). On the contrary, SSA only looks at an individual's wages in the eligibility process for SSDI.

Another difference in the two programs is how the amount of the check is determined. For SSI, Social Security has a specific calculation that takes into consideration any unearned income an individual receives (e.g., SSDI, Veteran's benefits, etc.), the individual's earnings from a job (if they have one), and applicable work incentives. Once all numbers are calculated, the SSI check amount is determined. The amount of someone's SSI check can vary from month to month based on the factors mentioned above. The most an individual can receive in SSI per month in 2007 is $623.

The amount of an individual's SSDI check will not vary from month to month. However, the amount received from one person to another will vary. One individual may receive an SSDI check of $1,000 and another only $200. This is the difference in how long a person has paid into the system and how many credits he or she had when they became disabled by Social Security's standards.

The last difference between the two programs is how they are affected by work. When an individual is receiving SSI only and works, the SSI check will decrease as the paycheck increases. If the person decreases the number of work hours, the paycheck decreases, then the individual's SSI check will increase. For individuals receiving SSDI, they will either receive the full SSDI check or no check at all. This depends on where they are in their benefits cycle, as well as how much they are earning. There is no gradual increase or decrease as a person's paycheck varies.

What do you mean by where the individual is in the benefits cycle?

When an individual becomes eligible for SSDI or Childhood Disability Benefits, they also become eligible for two important work incentives: Trial Work Period (TWP) and Extended Period of Eligibility (EPE). The trial work period is a nine month time period in which individuals can try out work without the fear of losing their cash benefits. The Trial Work Period begins when individuals become eligible for benefits, but ends at different times for different people. An individual's TWP will end when they have worked at least 9 months (not necessarily consecutive) in a rolling 60-month period above the trial work period amount ($640/month in 2007).

After an individual's Trial Work Period ends, their Extended Period of Eligibility begins. The EPE is 36 consecutive months during which they can work and still receive benefits for any month their earnings are not "substantial." Remember that in 2007 earnings of $900 or more ($1,500 if an individual is blind) are considered substantial.

Each person who receives a SSDI or CDB benefit can be at various stages is their TWP or EPE. Dependent on when a person became disabled and eligible for benefits and how much he or she has worked since receiving benefits will determine where the individual falls in this cycle. It is best to work with the Social Security Administration to figure this out.

Can a person with a disability get SSDI even though he or she has never worked? I know a person in our facility-based program whose father does not want her to work for fear of losing her SSDI check.

A person with a disability cannot get SSDI if he or she has never worked and in turn never became insured by paying FICA taxes. But, a person can receive a different type of Social Security disability check called Childhood Disability Benefits or CDB that falls under the same umbrella as SSDI. Many times people think that these two benefits are the same but they are not.

Childhood Disability Benefits (CDB) were previously known as Social Security for Disabled Adult Children. Individuals may receive CDB based on their parents' work records. In other words, their parent's have paid into the Social Security system through FICA and have earned enough credits to become insured. In order to be eligible for CDB, an individual must:

- be at least 18 years old,
- meet Social Security's definition of disabled before they turn 22, and
- be the child of an insured worker who is either disabled, retired, or deceased.

If an individual does become eligible for and begins receiving CDB, it is important for him or her to understand that these benefits will be lost if the person gets married to anyone other than another Social Security beneficiary.

Although Childhood Disability Benefits and SSDI have two different names, they work the same other than the eligibility criteria. Like SSDI, the amount of the CDB check will depend on how much was paid into the system through the FICA taxes. If the individual who receives Childhood Disability Benefits goes to work, he or she will either receive the full check or no check at all. This will depend on where the individual is in the benefits cycle as well as how much they are earning.

Does everyone getting an SSI or SSDI check get the same amount each month?

No, each person's situation is different and so the amount of the benefit each person receives will be different. For individual's who receive SSI, if they don't have any unearned income, are not married, living alone, and are not working, they will probably receive the full SSI check of $623 (in 2007) per month. However, if they begin working or have any unearned income, the amount of SSI will change.

The amount of an individual's SSDI check depends on when Social Security determined that the person was disabled, how much FICA was paid over the individual's work history, and how many credits were earned. These factors will cause SSDI checks to vary from person to person.

Does an individual automatically lose health care benefits (e.g., Medicaid coverage) when he or she begins to work earning minimum wage?

No, work does not automatically cause loss of health care benefits for individuals who go to work. For individuals who receive SSI benefits, there is a safety net called 1619(b) that protects from the loss of Medicaid when an individual goes to work. 1619(b) is available to SSI recipients whose SSI decreases to zero due to their work earnings. In order to be eligible for 1619(b) it must be earned income or wages that force the SSI check to zero. In addition, the individual must continue to meet all of the other SSI eligibility requirements. He or she must continue to be disabled according to SSA standards and have resources less than $2,000. Individuals can keep their Medicaid through 1619(b) until they earn what is called their state threshold. This is an amount that varies from state to state and can range from $15,000 per year in the Northern Mariana Islands to $49,000 in Alaska. To find out what each state's threshold amount is, visit: https://s044a90.ssa.gov/apps10/poms.nsf/lnx/0502302200

Some individuals who receive SSI have extremely high medical costs and the state threshold amount for the state in which they live is not an incentive to return to work. For these individuals, it is possible for them to receive what is called an individualized threshold. A person with a disa-bility can request an individualized threshold through the local SSA office.

For individuals who receive SSDI benefits and have never worked while on benefits, they will have at least eight and a half years of Medicare coverage when they do begin working. The first nine months of Medicare would be covered under what is called a Trial Work Period (TWP). The following 93 months are called Extended Medicare Coverage. Even after the Extended Medicare Coverage ends, it does not mean that the individual will lose this medical benefit. Following Extended Medicare, individuals are able to purchase their Medicare coverage. This means that they would pay a premium to keep their Medicare.

Medical coverage, both Medicaid and Medicare, are extremely important to a large number of people with disabilities. It is critical for them to understand that going to work does not mean that their medical cover-age will immediately end. This is a myth that has long been prevalent in the disability community.

I know an individual who is still getting the same SSI check even though he is working 20 hours a week earning minimum wages. Is that possible? Whose responsibility is it to tell Social Security that he is working?

If an individual is working 20 hours a week earning minimum wages, he or she should not be getting the same SSI check as when not working. It sounds like this person has not reported earnings to Social Security. Reporting earnings or wages is a critical part of receiving benefits. It is the responsibility of the person who receives Social Security benefits to report this information to Social Security. Eventually the IRS shares information regarding individuals' work history with Social Security; however it usually takes several years. Individuals are responsible for reporting the following information to the Social Security Administration:

- Beginning or ending of a job,
- Number of hours worked per month,
- Amount of money earned per month,
- Changes in address,
- Changes in marital status, and
- Changes in living arrangements

Individuals who do not report their earnings will receive an overpayment from Social Security. This is when Social Security gives an individual a check that they should not have received (or were not eligible for). Overpayments can sometimes be very large if the individual is unaware of how benefits work and when a check should and should not be received. Fortunately, Social Security is very good about working out payment plans with people so that they do not have to repay large sums at one time. Often, Social Security will reduce the amount of the individual's check for a number of months or years until the overpayment has been repaid.

How can individuals with disabilities afford all the related expenses for working such as specialized transportation? Wouldn't they be better off not working and just getting a SSI or SSDI check?

Social Security has a work incentive that helps individuals go to work and keep the supports that they need in order to work. This work incentive is called Impairment Related Work Expense or IRWE. In any month an individual is working, he or she can use this work incentive, no matter how many months or years the job lasts. The individual gets "credit" for these expenses every month as long as he or she meets the rules associated with the work incentive. These rules are as follows.

1. The item or service must be needed to help the individual work.
2. The individual must need the item or service because of a disability or any other impairment that is being treated by a doctor.
3. Individuals must pay for these support items and services out of their own pocket and cannot be reimbursed for them from anyone else (i.e. State Rehabilitative Services).
4. The cost of the service or item must be reasonable. This means that the individual is paying the same for the item or service as anyone else in the community.
5. Individuals must get the expenses approved by Social Security.

There are several other things for people to remember about this work incentive. It is available to individuals who receive both SSI and SSDI. Also, individuals must keep copies of their receipts for their work support items and services. These receipts must be submitted to SSA in a timely manner. Individuals can contact their local SSA office to find out how often they should submit this information.

One person that I know really wants to go to work. But, she has a lot of medical expenses including mental health counseling once a week. What should she do?

An individual's counseling and some medical expenses may be considered Impairment Related Work Expenses (IRWE) as outlined in the previous answer. Often in order for a person to go to work and stay employed, he or she will need counseling and medications.

These supports must meet the IRWE criteria mentioned above. This individual will need to contact SSA and explain how these supports meet the IRWE criteria. If Social Security does approve the counseling and medical expenses, then the individual will need to keep receipts for the expenses and submit these receipts to SSA in a timely fashion.

What happens if a person goes to work and then loses their job? I have heard that it is very difficult to get back on the "benefits roll." Several individuals are afraid they won't get a check if this happens, and have decided to stay in our facility-based program.

Losing a job is a natural part of the working world. It happens to almost everyone at some point in his or her life. Often people are concerned about going to work, because they have spent so much time trying to get onto Social Security benefits that they fear work will automatically mean they will lose their benefits. However, Social Security has a number of "safety nets" built into both the SSI and SSDI systems.

For individuals who receive either SSI or SSDI and lose their job, as long as they are still eligible for benefits, all they need to do is contact Social Security. They should notify SSA that they have lost their job and are requesting reinstatement of their benefits. SSA will verify their benefits information and resume the SSI or SSDI benefits.

In the event that an individual's benefits have been terminated, there is a protection called Expedited Reinstatement (EXR). Expedited Reinstatement is available to individuals who received either SSI or SSDI and had their benefits stopped by SSA due to their work or earnings. Individuals are able to request that their benefits start again without having to complete a new application. While SSA determines whether an individual can get benefits again, SSA will give the person provisional (temporary) benefits for up to 6 months. Individuals are eligible for Expedited Reinstatement if they are an SSDI or SSI beneficiary who:

- Stopped receiving benefits because of earnings from work,
- Are unable to work or cannot work at what SSA says is a substantial level,
- Are disabled because of an impairment(s) that is the same as or related to the impairment(s) that allowed them to get benefits earlier, and
- Make the request within 5 years from the month their benefits ended.

I know that a person can't have more than $2,000 and still qualify for benefits. I hear a lot about individuals with disabilities starting their own businesses. How is that possible?

The $2,000 resource limit is only applicable to individuals who receive SSI. Social Security has two programs that help SSI recipients start businesses without having to worry about the resource limit: Plan to Achieve Self-Support (PASS) and Property Essential to Self Support (PESS).

A PASS allows individuals to use their own income and/or things they own to reach a work goal. For example, an individual can set aside money to go back to school, or to get specialized training for a job or to start a business. An individual's goal should be a job that allows him or her

to earn enough to reduce or eliminate the need for benefits provided under the SSDI and SSI programs.

Social Security does not count some resources that individuals need to be self-supporting when they decide if an individual is eligible for SSI. These items are called Property Essential to Self-Support (PESS). Examples of PESS would be property such as tools or equipment that an individual uses for work. Or, if the individual has a business, inventory would be considered property essential to self-support.

There are no resource limits for individuals who receive SSDI. Individuals who receive SSDI and want to start a business are able to save money without fear that it will affect their benefits.

Should our program have someone on staff that is an "expert" in benefits counseling to help consumers decide how they can pursue competitive employment vs. staying in the facility-based program?

Programs should either have an "expert" on staff or know how to contact a local "expert". The benefit of having an expert on staff is that customers can find out all they need to know about work and their benefits at one location. It is important to remember that in order to become an expert, the staff member will need extensive training on all of the nuances of all Social Security Disability programs. And because Social Security benefits are complex and change often, the staff person will need to participate in continued training to ensure that they have accurate information and do not give incorrect information to customers.

If it is not possible to have an expert on staff, then programs should know where to send their customers for expert assistance. Programs have two options: Social Security local field offices and Work Incentives Planning and Assistance (WIPA) projects formerly known as BPAO's or Benefits Planning Assistance and Outreach projects. In order to find the Social Security office for a given area, go to: https://s044a90.ssa.gov/apps6z/FOLO/fo001.jsp. Individuals can find the WIPA project that covers a given county or state, by visiting www.vcu-barc.org or www.ssa.gov.

esources

Red Book: A Summary Guide to Employment Support for Individuals with Disabilities under the Social Security Disability Insurance and Supplemental Security Income Programs

Available Online: http://www.socialsecurity.gov/redbook/eng/redbook2006.pdf

Social Security Online: http://www.ssa.gov/

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