**Webcast:** Integrating Customized Employment Strategies into the Vocational Rehabilitation System

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(Slide 1) CINDY CAI: Good afternoon. And welcome, everyone, to today's web talk, entitled Integrating Customized Employment Strategies into the Vocational Rehabilitation System. I am Xinsheng Cindy Cai from the American Institute for Research, or AIR, are who led the effort of developing the web talk. We're excited to have a panel of speakers with deep knowledge and practical expertise on customized employment.

The panel will share insight on how customized employment strategies can be used to facilitate the implementation of Workforce Innovation and Opportunity Act, or WIO.

The webcast is offered through the Center of Knowledge Translation for Disability and Rehabilitation Research, or KTDRR, funded by the National Institute on Disability, Independent Living, and Rehabilitation Research or NIDILRR.

I want to thank Rebecca Gaines from AIR who was instrumental in developing today's web talk. We have information that accompanies today's web talk on our website at KTDRR.org.

This includes a PowerPoint file and a text description of the training materials. Please remember that these materials are copyrighted and you must contact our presenters to ask permission to use any of the information.

(Slide 2) Here is our agenda today. The presentation will include information on effectively integrating provisions of the WIOA into public VR systems, plus strategies and tools for implementing these provisions in a manner that promotes quality and sustainability. Both ideal implementation methods and pragmatic methods are presented based on Florida's efforts to incorporate customized employment strategies to benefit customers who have not been successful at achieving a competitive integrated employment outcome through traditional VR strategies.

Panel representatives will provide an overview of the implementation process from the VR perspective and from the perspective of the community-based VR vendors.

The webcast will also include information of the customized employment certification process that has been developed to train community-based providers. The panel will provide insight into implementation challenges and lessons learned as a method to assist other states and communities in replicating the process.

(Slide 3) Now I'm going to turn to the panel who will introduce themselves to you, and then begin the presentation.

WAYNE OLSON: Hello. My name is Wayne Olson. I'm the Area Director for the Division of Vocational Rehabilitation in central Florida. I've been with Vocational Rehabilitation in Florida for 36 years, starting as a counselor in 1980. In 2011, my team ran a pilot on the discovery process using central Florida contract vendors. The results of this pilot ended up promoting discovery as a statewide tool. Locally in central Florida, there are 23 vendors providing discovery services, resulting in higher quality job placements for the most severely disabled consumers.

Statewide, there are over 100 certified vendors. We continue to promote the use of discovery as a tool for future implementation of customized employment in WIOA. Jose?

JOSE RIVERA: Hi. I'm Jose Rivera. I am the Contract and Discovery Liaison for the Florida Division of Vocational Rehabilitation in area three. During my tenure with Vocational Rehabilitation, I also worked as a Senior Counselor and VR consultant. I participated in two discovery pilots with Vocational Rehabilitation in 2009 and 2011, and have since been responsible for implementing and tracking the growth of the discovery program in the central Florida area.

In addition, I provide continuous training and process improvement to vocation rehabilitation staff and contract providers in all aspects of the discovery process. Vanessa.

VANESSA RODRIGUEZ: My name is Vanessa Rodriguez, and I currently serve as the Vice President of the Diversity Initiative, Inc., or TDI, in supportive employment community service provider, serving vocational rehabilitation areas three and four. I have personally assisted hundreds of Floridians with disabilities transition into permanent community-based employment at competitive wages through best practices, person-centered approaches, and relationship building with the business community.

A proud alumnus of the University of South Florida Honors College, I hold dual degrees in psychology and biomedical science. I have been certified by the United States Psychiatric Rehabilitation Association as a psychiatric rehabilitation practitioner. My other professional certifications include advanced supported employment, discovery, and self-employment. Tammy?

TAMMY JORGENSEN SMITH: Hi. I'm Tammy Jorgensen Smith. I earned my Master's degree in rehabilitation services from Florida State University, did my PhD in counselor education from Barry University. And I've been a certified rehabilitation counselor since 1999.

I joined the University of South Florida in 2007 as a research assistant professor with the Florida Center for Inclusive Community. Currently, I'm a tenured associate professor in the Rehabilitation of Mental Health Counseling Program. My research focuses on the development and implementation of innovative customized employment models to promote full inclusion and self-determination for people with disabilities.

(Slide 4) I'd like to begin with rationale for utilizing customized employment strategies that goes beyond WIOA provisions to the philosophy of employment first. Many of you may be familiar with the employment first movement. Employment first is a declaration of both philosophy and policy, stating that employment is the first priority and preferred outcome of people with disabilities.

The philosophy is founded upon the attainment of real jobs in competitive, integrated settings with real wages that are comparable to wages earned by others doing similar work. Most of enter the field of rehabilitation counseling because we are helpers by nature. We want to create a positive impact on the lives of others and for society at large.

As we are counselors, we recognize the importance of work as a fundamental human right for all people. We know that through employment, people with disabilities can achieve greater levels of independence and self-determination, and that what we do as VR counselors promote quality of life through meaningful activity and integration into the community.

(Slide 5) Customized employment strategies are helpful in many aspects of life, whether a person has a disability or not. Many people use career assessments and other methods to identify their career interests and talents. Most use personal and professional connections to find jobs. When needed, we request flexible work schedules or modifications to accommodate further education, family, or other commitments.

These same tasks often come much more easily for those of us who do not have challenges such as limited communication skills, complex physical disabilities, cognitive processing issues, severe and persistent mental health issues, social behavior issues, and dual diagnoses. For example, people who have limited speech may not be able to respond quickly to assessment questions such as those in typical interviews. They may also have a difficult time expressing their interests and explaining their talents.

Work environments are often not designed to be sensitive to sensory issues such as temperature and intolerances, noise levels, and lighting. Many employers are not focused on unique, interpersonal, and learning styles. Not because they are not willing or able to be, but because they aren't aware of the need to be.

Customized employment strategies open doors for people who have not been successful in achieving competitive integrative employment roles because of the complexity of their disabilities. It is not a new concept or process. These strategies have been demonstrated to be successful for decades.

Like many innovative approaches, it takes time to get to a point of system change. As for customized employment, that time has come. And we now have the opportunity to utilize these strategies to include successful rehabilitation rates for VR consumers with the most complex disabilities.

(Slide 6) The customized employment process is grounded in social ecological theory in that it acknowledges the complex interplay between a person and the environment and emphasizes the importance of person-environment fit, as well as the diverse systems that influence human functioning. It takes into consideration the unique aspects of each person, such as the person's age, type of disability, functional capacity, disposition, and interaction style, while recognizing contextual factors such as living arrangements, geographical location, support systems, connections, and resources to help facilitate an employment outcome that aligns with the individual's interests and talents while considering conditions that may impact successful long-term employment.

(Slide 7) As seen in the previous figure that illustrates the socio-ecological approach, the macro level, or outside ring, is a systems component which includes laws, policies, and practices. The primary reason for integrating customized employment strategies into the VR system is for a value in the successful rehabilitation of consumers with the most complex disabilities. This rationale is supported by recent legislation that identifies customized employment as an employment outcome under the Public Vocational Rehabilitation Program.

(Slide 8) Customized employment is identified by WIOA as competitive integrated employment for an individual with a significant disability that is based on an individualized determination of the strength, needs, and interests of the individual with a significant disability designed to meet the specific abilities of the individual and the business needs of the employer, and carried out through flexible strategies.

(Slide 9) As mentioned earlier, the customized employment process considers unique aspects of each person such as age, type of disability, functional capacity, disposition, and interaction style. Customized employment also recognizes contextual factors including resources, living arrangements, geographical location, and services and support that the person receives. The information gathered in the first phase of the customized employment process helps to facilitate an employment outcome that aligns with the individual's interests and talents while considering conditions that may impact successful, long-term employment.

(Slide 10) This figure illustrates the customized employment process. As you can see, the job seeker is at the center of the process and should always be involved in every aspect of his or her vocational rehabilitation. The customized employment process begins with discovery and proceeds through the steps to employment and post-employment supports that facilitate job retention.

This is not a linear process. For instance, discovery will continue to take place throughout the process and the vocational profile is ever evolving to reflect newly obtained skills, interests, and support needs.

(Slide 11) Discovery is a type of naturalistic assessment that uses qualitative methods to gather information useful in building a narrative snapshot of the job seeker to facilitate the identification of ideal working conditions. It is a vital part of the customized employment process, because it promotes improved employment matching. The discovery process takes place in natural environments such as the home, neighborhood, and community. It includes interviews, conversations, observations, and records reviews to get to know the job seeker and his or her interests, talents, and conditions for employment, such as environmental tolerances and social interaction skills.

Discovery provides information that is not always available through traditional vocational evaluations. Assessments utilized in traditional vocational evaluations are generally normed to a general population and do not take into consideration the special circumstances of complex disabilities. For example, a person who has a cognitive disability that impacts memory and processing skills is not likely to score highly on many of the tests and assessments that are part of a traditional vocational evaluation. A person with limited speech will likely have difficulty with vocational inventories in interviews.

Discovery allows the evaluator the time and environment necessary to get to know the person and to see him or her at his or her best. This strategy facilitates a much deeper understanding of the talents and support needs of each person, which equates to better employment matches and greater retention of employment.

(Slide 12) The vocational profile is the product of the discovery process. It is a document that provides a robust, narrative snapshot of a job seeker based on the individual's strengths, interests, and ideal working conditions. Unlike traditional vocational evaluation reports, the information contained in a vocational profile is non-evaluative, does not contain scores, and does not compare the job seeker to a normative sample, the general population. The document is a tool that is utilized by the job seeker and his or her team to assist in the identification of feasible and appropriate employment matches that align with the person's interests, skills, and talents.

(Slide 13) The customized planning meeting should take place within two weeks of completion of the discovery process. This meeting involves a job seeker, family, friends, advocates, service and support providers, the VR counselor, and other relevant stakeholders. The purpose of the meeting is to bridge the gap between discovery and employment.

The product of the meeting is an action plan or blueprint that outlines the steps necessary for the job seeker to reach his or her employment goals. The blueprint contains the employment goal for up to three prioritized employment options, the actions set to achieve the goal, the persons responsible for each action step, a time frame for completing each step, and a status column to keep up with comments on progress, challenges, and other important information, such as contacts and opportunities.

(Slide 14) Visual resumes are becoming popular with many individuals who wish to stand out from the crowd when applying for a job. They are particularly useful to individuals who may not be able to express their talents and abilities in verbal format, as is traditionally done through the interviewing process. A visual resume uses photos or video clips to present the job seeker to the employer. It may be used to demonstrate the job seeker completing tasks essential to the position.

(Slide 15) The customized approach to job development involves negotiation, matching, and analysis of unmet needs of employers. If a match between the job seeker's talents and the needs of the employer is identified, customization of the job begins. An essential element in customized employment is negotiating job duties and employer expectations to align the skills and interests of the job seeker to the needs of an employer. This negotiation results in a job description that outlines the customized relationship between the employer and employee.

Options for customizing a job description include job carving, task reassignment, job creation, and job sharing. Other points of potential negotiation and include job support, the hours or location of the job, or specifics of supervision.

(Slide 16) Job placement does not always equate to successful employment. It's very important to identify good employment matches. It is just as important to ensure that the employee is able to be successful at the job through the provision of accommodations and support. Both employees and employers should be aware of the services available through the Job Accommodation Network at askjan.org to aid in the identification and implementation of accommodations as required by the Americans with Disabilities Act.

It's also important to facilitate the development of natural supports and resources that can be utilized to target solutions to problems that may arise when the person is employed. Having these supports in place can be the difference between resolution of a problem and retention of employment, or starting from square one if the person loses the job due to an issue that could have been resolved.

(Slide 17) Learning to apply to customized employment process with fidelity to the model requires time and practice combined with training and technical assistance from a person with expertise in the process. Florida implemented a certification process to ensure that strategies are implemented by highly trained, competent providers. States and systems should take this into consideration when incorporating customized employment strategies into their service option.

Several fidelity instruments have been developed through the discovery process. However, none of these instruments have been tested or validated as reliable tools. Currently, national experts are coordinating in the development and validation of the discovery fidelity scale that can be used by all for training and quality assurance.

(Slide 18) Two implementation approaches are shown in this diagram-- an ideal approach and a pragmatic approach. The ideal approach replaces traditional vocational evaluation with the discovery process where warranted due to the complexity of the VR applicant's disability. Employment first philosophy asserts that all people have talents to contribute to the workforce. The discovery process, by design, identifies these talent. Therefore, implemented properly, no person would be found too significantly disabled to benefit from VR services.

The system currently does not have the capacity for such a large influx of new consumers. Therefore, Florida implemented a pragmatic approach by identifying current consumers who have not been successful at obtaining competitive integrated employment through traditional strategies. These consumers are eligible to be referred for customized employment services.

(Slide 19) As mentioned, public VR systems typically do not have the capacity to serve every person who has a disability that impacts the ability to work. VR systems are underfunded and experience high turnover, which results in understaffing and large caseloads. High turnover creates expenses for recruiting, hiring, and training, less experienced counselors, heavy caseload burden, and counselor burnout. As with most systemic changes, VR systems need time to adapt policies and processes, train staff, identify additional resources, and moderate resistance that may add to issues of turnover and burnout when implementing WIOA provisions.

(Slide 20) To implement customized employment strategies in a more pragmatic way, discovery is added to the individualized plan for employment, or IPE, as an amendment when traditional strategies have not resulted in competitive integrated employment. The reason this approach is not ideal is that many applicants with the most significant disabilities are determined ineligible for VR services based on traditional vocational evaluations. For example, a person with autism and limited speech may not fare well in the prescribed environment of the traditional vocational evaluation where he is interviewed, tested, and scores are compared to a normative sample.

Another reason that this approach is not ideal is that the time frame from employment planning to employment outcome may be delayed when customized employment strategies are not employed until after traditional strategies have failed. This pragmatic approach is ultimately more costly. So it will be important to look into migrating to the ideal approach once infrastructure is in place to make this practical and feasible.

(Slide 21) Integration of customized employment strategies into VR systems necessitates towards organizational and systems change. Effective integration of any new practice into an existing system requires extensive upfront planning that includes input and training of the various stakeholders who are involved. Stringent project management like a core implementation team, a solid action plan for implementation and expansion, and ongoing evaluation to ensure the practice is effective in producing the desired outcome.

(Slide 22) Three tools can be utilized to facilitate planning, project management, and evaluation. A roadmap is a comprehensive planning that builds understanding and consensus around key project components and includes a communication plan, logic model, work plan, and evaluation strategy. An integration scale is used to measure agency progress in integrating new practice areas, assessed including stakeholder buy in, policies and procedures, capacity and resources, data collection, accountability, evaluation, and a continuous improvement plan.

A community of practice is a group of peers implementing similar projects that maintain scheduled communication to share best practices and lessons learned.

For more information on these tools and strategies, please read the associated article that has been published in the Journal of Disability Policy Study. An access link is provided on this slide.

(Slide 23) So now that we've covered the steps of the customized employment process, let's talk more specifically about the role of VR counselors.

There are three major areas of involvement for the VR counselor. The first area pertains to appropriate referrals. A good match between the consumer and the community rehabilitation provider increases success rates. Check for location and specialization matches. If the provider and the consumer are too far from each other, it's more difficult to schedule discovery activities.

The next important role of the VR counselor is the review of the vocational profile. The focus should be on the discovered interests, talents, and conditions for employment, and the translation to potential employment opportunities that are feasible to the consumer. The information in the profile can be utilized to confirm the employment goal on the IPE and to identify additional services needed by the consumer.

Whenever possible, the VR counselor should attend the customized employment planning meeting. Also when making the referral for customized job placement services, it's very helpful to refer the consumer to the same provider who facilitated the discovery process to ensure continuity of services. He or she has spent considerable time with the job and know them well at this point.

Florida VR is in the process of expanding customized employment services to include the full process. Until recently, the only strategy that had been integrated was discovery. In Florida, the customized job placement service is listed as an option on the supported employment referral form. This service is an enhanced fee, paying double the amount for a typical supported employment placement. This is to incentivize providers to take the time to customize job placement services, as it is recognized that it will likely take longer than traditional supported employment services.

Much more information is available regarding the customized job development and negotiation strategies. Florida's team will continue to share our progress with other states to help facilitate this opportunity for growth and change, and to best support people who have complex disabilities to be fully included in our communities and in the workforce.

(Slide 24) At this time, Wayne and Jose will present information pertaining to the vocational rehabilitation perspective regarding the integration of the discovery process as a billable services for Florida VR consumers. Wayne?

WAYNE OLSON: Yes. In 2009, VR was trying to establish a better working relationship with the Agency for Persons with Disabilities, APD, representing clients with developmental disabilities in the state of Florida. For years, there had been questions as to why the most severely disabled clients referred by APD were not being served by the VR program.

We took this on as a process improvement project, utilizing the new position of process improvement consultants to lead the effort. After several meetings with APD and tracking all referrals to determine outcomes, we found that most referrals were being determined as too severe. Typically, a referral from APD was sent for work evaluation and closed as unable to work. Then it became APD's responsibility to get the client into sheltered employment.

As APD tightened their rules on who could go into sheltered employment, it became necessary to find a way to achieve more employment outcomes with this population. Both VR and APD staff agreed that discovery and customized employment could possibly be the solution. We were able to convince the VR state office to let us run a pilot funded by Southeast TACE and facilitated by Mark Gold and Associates, the experts in the customization process.

The pilot started with seven interested vendors who sent 20 individuals to learn the discovery process and complete profiles on actual VR clients. The Florida Center for Inclusive Communities at the University of South Florida assisted with the assessment of the profiles while developing an online course to train future participants.

At the end of the pilot, we had nine certified individuals. Today, we have 23 certified individuals working for 13 contract vendors in central Florida. Now that customized employment is part of WIOA, these efforts will give us a head start toward the implementation of customized services statewide.

(Slide 25) In Florida, state vocational rehabilitation customized employment program begins with the discovery process. Let me walk us through the VR discovery guidelines and considerations.

So what is discovery? Discovery is the first piece of the customized employment process. It is based on the belief that everyone can work. For some with multiple limitations, an in-depth study is required to find the talents that will lead to employment. Standardized assessments tend to rule people out by exposing what they cannot do. They rarely find the hidden talents.

Discovery is the foundation for customized employment planning. It gives you the information you need to build a customized job. It is heavily influenced by the principles of person-centered planning, self-determination, and informed choice.

Discovery is not a vocational assessment. It does not compare the person to common norms and standards. It does not determine the success of an individual based on test performance. This process is not about changing the individual, but about using the skills that they already posess. This is not a fast process. You can learn a lot about an individual in a short period. You cannot learn a lot about an individual in a short period of time.

Customized employment does not end after discovery. It builds upon what you learn about the individual during the discovery process. In Florida, we chose to learn discovery first in order to build our own foundation. We must now figure out how to implement the entire customized model as required by WIOA.

Jose?

(Slide 26) JOSE RIVERA: So now that we've done our recap, let's talk about some considerations in the referral process. For the consumer, employment must be the goal. Discovery in Florida, DVR, is not about linking people to volunteer opportunities or additional educational experiences to secure employment. Rather, the focus of discovery is to identify where the consumer is at their best and how they best fit with that employer.

Though discovery can work for anyone with or without a disability, it is a requirement of Florida DVR that the consumer must be eligible for supported employment to qualify for discovery services.

(Slide 27) Then the considerations-- a vendor must be registered as a supported employment provider with Florida Division for Vocational Rehabilitation to offer discovery. The specialist facilitating the discovery is expected to be certified for discovery services. The intention is for the consumer to stay with the same provider through the whole customized employment process, because they will gain an in-depth understanding of the job seeker to best assist them with a quality, successful placement.

(Slide 28) VR consular considerations-- there are two authorizations for the discovery process. The fee codes are listed on this slide. When sending referral information to the provider, it is a best practice to send supporting documents for later review as well. These documents will help create a more complete picture of who the person is since the process is time limited.

Types of documents that may be helpful in this process may include medical records, psychological records, IEPs from school, etc.

There are many things that can impact the timeline for the process. For example, during the summer months, many families go on vacation. So the individual may not be available to begin the process for several weeks. Unresolved medical or mental health issues may also cause delays in the process. Ideally, six to eight weeks is the target time frame. However, we have seen variances based on the unique situations that have arisen after the referral.

Flexibility, communication, and ensuring that the individual is committed to and available for the process are key components to a successful discovery experience.

(Slide 29) The discovery process is intense and personal. In order to maximize the benefit of discovery and receive quality information, the VR counselors should consider the following questions.

(Slide 30) Is employment a priority for this consumer? If actively seeking employment, is the consumer willing to suspend the job search to participate in the discovery process?

(Slide 31) Will the individual allow access to supports when available? Will the individual, and supports where applicable, allow access to the home? Remember, there may be other questions or situations that arise during the referral consideration process since every consumer would have their own individual needs.

Wayne.

(Slide 32) WAYNE OLSON: Once a consumer is referred to discovery and a supported employment vendor, the components of discovery services are the meet and greet appointment, the hours of observation, conversations with all involved, the profile writing-- also known as discovery staging record-- and the planning meeting.

(Slide 33) Scheduling the meet and greet appointment is the first step a vendor takes after receiving a referral. This is where participation and commitment expectations are reinforced, timelines are established, and more, as you can see on this slide. Because discovery is an intensely person-centered process that involves going to people's homes and getting to know someone very personally, it is important to establish at the onset that discovery is a goal-oriented and formal process that requires the commitment of the individual and their supports.

A helpful recommended best practice spoken about in the training course is to hold the meet and greet appointment in an office setting. If you've never referred someone to discovery or worked with a particular specialist as a VR counselor, it is highly encouraged to participate in a meet and greet appointment. Discovery works best when VR counselors are an active partner in a successful discovery experience. Additional benefits of participating are covered in this slide.

Jose?

(Slide 34) JOSE RIVERA: On this slide, you will see the iceberg analogy of only knowing minimal information when there is so much more to each of us. The hours of observation is where the bulk of our information comes from in the discovery process to move beyond the surface level. This includes familiar and novel activities that provide a better understanding of who the person is while discovering what tasks the individual can do and what skills the individual has that could contribute value to a job.

The activities are intended to capture where the individual is at his or her best. The first visit following the meet and greet appointment is ideally the home visit. But there should be a balance of home and community-based activities. The community observations should occur in competitive settings, although we realize that some of the individuals with the most significant disabilities spend time in sheltered settings. So there may be observations that take place there from time to time.

Observations are also used to identify conditions for success in employment, which are variables beyond the tasks that can impact a person's success on the job. For example, the environment, accommodations, supervisory styles, etc.

(Slide 35) In addition to our observations, information about the individuals we are serving is informally gathered through conversations. In speaking to people who know the individual best, the specialist gets to know the person being supported on a deeper level, and discovers together his or her individual goals. On this slide are examples of individuals who can contribute to developing clearer and concise methods to help the person being supported to achieve their employment goals.

(Slide 36) Based on information gathered through observations and conversations as well as the review of available documentation, a vocational profile is created. A vocational profile is a positive and descriptive picture in narrative form of who the consumer is based on observations and conversations in the discovery journey. The blueprint for a successful employment plan is distinct from an IPE.

Wayne.

(Slide 37) WAYNE OLSON: A quality vocational profile should capture the best and more meaningful aspects of a person's life. It should make the reader feel that they know the person, because it is descriptive. A narrative should be comprehensive, free of opinions, and written from the perspective that the consumer will be successful in employment.

Although there may occasionally be a need to discuss disability-related issues and solutions, the focus of the narrative should be skills, contributions, interests, and conditions for success in employment. A successful discovery experience should include a review of the vocational profile by the individual prior to submission to vocational rehabilitation. This is to ensure that the individual feels that the content is an accurate reflection of who they are, and that sensitive information is handled with caution.

It is important to note that because the ownership of the process lies with the individual, some of this private information may not make it into the profiles. Jose?

(Slide 38) JOSE RIVERA: The planning meeting belongs to the individual, and is where employment planning begins. It is often necessary to determine who holds the trump cards at the meeting. No more persons payed to attend should be invited than those not paid to attend. The individual, family, VR counselor, and the discovery specialist should schedule the planning meeting.

The specialist suggests participants based upon discovery. But the job seeker should select and approve the persons participating. A planning meeting may include up to 10 to 12 people maximum. So space considerations may need to be made.

(Slide 39) This process is something like home builders meeting with the architect and builder for the design of a custom home. In our opinion, the planning meeting is the most important phase of the discovery, as it serves as the catalyst for employment once completed. Wayne.

(Slide 40) WAYNE OLSON: What are some of the challenges we face in moving forward? When we first began promoting discovery in customized employment in Florida, vendors and counselors were not accepting of this new way of thinking about our consumers. Emphasis upon meeting numbers does not facilitate a model that requires in-depth services over an extended period of time. Both vendors and counselors are constantly required to play the numbers game. Yet the law has always required us to serve the most severely disabled first.

The two are not totally compatible, creating a constant dilemma, because numbers around the performance evaluation of the VR counselor and income allows the vendors to operate, the winner is almost always the easier placement. How can someone spend six to eight weeks on one consumer?

One vendor is doing just that by staging the discovery consumers so that she is always working with more than one at a time. This vendor has built an expertise in discovery and is able to complete a profile in less time. Like anything, when you become an expert, you can work much faster and make more money doing it.

From the counselor perspective, much is being thrown at them with the WIOA implementation. It will take constant vigilance to get them to accept something this unique and foreign. However, those who we have been able to convince to try discovery have, for the most part, become converts.

One misconception is that only the most severe clients can benefit from discovery and it should not be used elsewhere. Changing this perspective will require getting multiple individuals buying into the process and sharing the success with others. Therefore, the biggest challenge is to get multiple vendors and counselors who have found value in this unique perspective to tell others of their successes and convince them to try it.

It helps now that it is part of the law. In Florida, we were promoting it long before it became law. Now our main challenge is to turn our discovery processes and what we have learned into some amazing customized employment outcomes. Jose?

(Slide 41) JOSE RIVERA: We have learned from our eight-year journey with customization that there should be at least one very well-trained subject matter expert in each area. An in-depth training for VR counselors should be part of the onboarding process, and regularly offered for VR staff. A recertification process for our providers to show that their skills and knowledge base have not diminished since their original certification along with continuing education opportunities are needed.

We have learned that we may want to use an agency certification model in the future. It may be best for vendors to have dedicated staff to completing discovery services. The need for a fidelity scale to provide consistency and standards to the discovery work being done is essential. As the number of providers for discovery grows, the need for more unifying guidance is evident.

Finally, a systemic and philosophical change like this one does not happen overnight. Those proponents of customized employment must no yield to any pushback from those that do not want to give this process its due. Just keep moving forward as slowly or as quickly as you can.

(Slide 42) We will now turn things over to Vanessa so that she may provide the vendor perspective.

(Slide 43) VANESSA RODRIGUEZ: Hello, everyone. Thank you for having me. On behalf of the Diversity Initiative, it is a pleasure to join you today to share some of our experiences from the provider perspective regarding customized employment processes.

Let's begin by reviewing the graphic on the screen that illustrates the coordinated provider services that facilitate customized employment via supported employment referral and Florida's Vocational Rehabilitation System. This presentation will not include the supported self-employment flow of service leading to customized employment for simplicity and due to time.

Earlier, you heard from my Division of Vocational Rehabilitation colleagues about how the discovery process is facilitated within Florida Voc Rehab. To recap, discovery certified staff, sometimes referred to as a discovery specialist, are employed by a supported employment contracted service provider, such as the Diversity Initiative, and receive authorizations to provide the discovery service. In general, the discovery specialist will then reach out to the individual, facilitate the discovery process, and produce the vocational profile.

The vocational profile is then used by the vocational rehabilitation counselor for planning and determining the individual plan for employment goal, also known as the IPE. A provider-- in ideal cases, the same one who completed the discovery process-- then receives a supported employment referral to begin working with the individual towards an employment outcome.

The first step upon receiving a supported employment referral from Florida VR is an individualized career plan, also known as an ICP. The ICP is a distinct service from the discovery process that utilizes the information obtained in discovery as a foundation. Following the ICP is engagement of consumers, and businesses, and activities leading towards a successful, long-term, customized employment experience.

(Slide 44) Customized employment is not a new service from the service provider perspective, in that job developers and employment specialists have been carving out employment opportunities or creating new jobs since the start of supported employment-- and even before that for job seekers without disabilities.

However, in recent years, more concrete information of how customized employment may be achieved successfully for jobseekers with disabilities has been made available through many concerted efforts across the nation. This slide highlights some of the foundational aspects of customized employment learned in those efforts.

Customized employment is a process that is distinct from traditional mechanisms of achieving an employment outcome. It provides much more flexibility for job seekers that have significant challenges to obtaining or maintaining employment via traditional or open market strategies. Again, it is important to understand that customized employment is a process and that there are some factors that help this process occur more expeditiously, such as quality discovery information, rich connections of the job seeker, or perhaps strong ties to the business community by the contracted service provider.

Part of what also contributes to the time the process takes is that the process is individualized. Providers need to be aware of and attuned to the preferences, needs, and goals of the job seeker, all while facilitating maximum independence as a core value of supported employment. In addition, the process is personalized. A mutually beneficial relationship between the needs, abilities, and preferences of the job seeker must balance with the needs or opportunity areas of the business for the match to be successful and long-term. This is also why customized employment is not only relationship-driven, but value-driven.

(Slide 45) Now that we have reviewed foundations of customized employment, on this slide, you will see examples of customized employment arrangements that service providers may help facilitate or guide individuals in achieving depending on the abilities. The first three examples are the ones that generally come to mind when we think of customized employment, and may be found on the Office of Disability Employment Policy's website, or www.dol.gov/odep.

These types of employment arrangements are typically employer-employee relationships. Task re-assignment is when certain tasks are reallocated to another person. So oftentimes, a new job is created. Job carving is modification of an existing job description in a way that the job seeker will then be able to complete it, but does not contain all aspects of the original description. Job sharing is when two or more individuals complete duties in line with their strengths to complete a job.

Two other types of less common customized employment strategies are also included on this slide. Proposing a business within a business may be a result of a supported self-employment service. And resource ownership is where a job seeker shares their equipment, technology, materials, or skills in a way that results in wages to the employee and increased profits for the business. From these examples, you can see how the flexibility of customized employment may help job seekers overcome challenges with the traditional employment process.

(Slide 46) As we touched on earlier, an important element of customized employment is a personalized, mutually beneficial relationship between the job seeker and businesses. Understanding the universal hiring rule is the key to service providers being able to facilitate a customized employment opportunity for individuals with the most significant disabilities. Employment specialists and job developers must demonstrate that the value of hiring the individual is greater than the cost the business will expend, and makes good business sense.

The specialist must identify a problem or an opportunity area. And the candidate must be the solution. Therefore, it is important for contracted service providers to have tools, such as the vocational profiles obtained through discovery, and/or processes in place that allow the person actually customizing the employment opportunity to get to know the consumer well to understand the value that they will bring to the workforce.

Some ways to demonstrate value include that the hiring will increase profits, decrease costs, reduce turnover, increase productivity, etc.

(Slide 47) Let's just take for granted that the job seeker has committed to working and is willing to try their best for the purpose of this slide, since those are foundations all job seekers should have who are engaged in the vocational rehabilitation process. Being charged with meeting the universal hiring rule to customize positions, the ways that consumers are engaged in the pre-employment process by providers differs from individuals who meet the qualifications and expectations of jobs that are regularly available in the local labor market.

One constant, however, is that employers seek motivated and dependable candidates in addition to skills, abilities, and work ethic. So ongoing assessment of these qualities is an important part of the service provider process.

When referred individuals need customized employment services, service providers facilitate engagement activities that are on one part geared towards monitoring these foundational employer needs. And on other parts geared toward furthering an in-depth understanding of the job seeker so that they may facilitate a good employment fit, and/or negotiate with a potential business or organization in which a customized employment relationship may be facilitated. Abilities, skills, preferences, and conditions for success will also continue to be explored within the vocational themes identified in the discovery process to determine the areas where the job seeker may contribute the most value.

It is important to note that just because a job seeker has an interest in a particular area, that does not mean that's what they want to do for work or where their skills are. Therefore, providers must be prepared to shift the question from, what do you want to do, to, considering the information learned in discovery, where might the individual be most successful given their abilities and expressed preferences? Where might they contribute the most value in an area where conditions for success will be satisfied?

Engagement activities may vary, but should be strategic and facilitate timely progress towards the goal of employment. An example would be informational interviews, which is also a business development activity we will review shortly.

(Slide 48) When a service provider is assisting in connecting a referred candidate to a customized employment opportunity, there are different strategies that may be used. One method is through informational interviewing of targeted businesses for which a customized employment opportunity may be found with the intention of identifying needs a business has that may be met by the candidate.

Another method is through intentional consultations with businesses for which a customized opportunity may be found. In this method, businesses are connected to the placement program. And through this relationship, tasks may be negotiated to facilitate customized employment.

In either one of these methods or strategies, planning is involved. And the provider must have an in-depth understanding of the job seeker. Insightful questions must be asked to identify priority needs and opportunity areas to determine if a customized employment arrangement may be a fit. In addition, both of these strategies usually involve more than the initial meeting and more than one employer to find an opportunity that might be a good fit for the candidate.

Business development efforts may occur in any size business-- public sector or private, nonprofit or for profit. Sometimes, providers may be inclined to focus on open market or large employers due to the accessibility. However, our experiences have been that greater opportunities are realized in the hidden job market, because there is less competition and a greater degree of flexibility for task negotiation if we can identify a need or opportunity area before someone else does and know the candidate we are supporting well.

Similarly, we've found success with small businesses, because the decision maker is more accessible to get around some of the red tape more corporate organizations may have with policies, procedures, etc. An employment specialist within the provider may utilize one of these techniques or both, depending on their own competencies, comfort, how the technique is received by the local business community, or other factors.

(Slide 49) This slide summarizes and contrasts the traditional and customized employment processes. In the traditional employment process, there is a strong focus on job readiness. Whereas in the customized employment process, there is a greater focus on engagement. Many individuals selected for discovery services in the state of Florida may not have enough or any work history to create a resume. So the candidate profile or visual resume Tammy spoke about is the marketing tool that a service provider uses to demonstrate abilities to bring value.

Lastly, the customized employment process makes it quite possible for individuals to circumvent the traditional barriers that keep individuals with the most significant disabilities from connecting to employment, such as not meeting minimum qualifications or not being able to communicate skills in a traditional interview setting. Once the employer has agreed that the candidate is the solution to their need, the application becomes more of a formality. And an interview becomes more of a meet and greet.

(Slide 50) So let's talk about some challenges. When our agency started the journey of developing a customized employment program, we encountered both external and internal challenges with successful implementation. On this slide are some of the external challenges that we experienced.

The primary external challenge was that the rate structure payment reimbursement provided by vocational rehabilitation is insufficient for the time and resources to provide the service. In the state of Florida, service providers are reimbursed rates based on successful placement and outcomes through successful closure. There are not hourly reimbursements for time or resources spent in assisting someone to obtain a successful employment outcome.

In addition, placement benchmarks for individuals whose disabilities have less of an impact on functional capacities related to employment are reimbursed at a higher rate by the state. The combination of these factors has resulted in an unintended consequence that time and resources are being prioritized and allocated towards individuals that do not require as much to draw down the revenue service providers depend on to stay in business.

Although there have been talks about an enhanced customized employment benchmark, as Tammy alluded to earlier, there is not a different payment available yet to offset the cost to service providers of time, resources, and staff development and training needed to facilitate customized employment.

Another primary challenge is that discovery is not part of a seamless supported employment experience within Florida vocational rehabilitation. Due to this, some secondary challenges arise. There are sometimes significant lags between completion of discovery and a supported employment referral, which may mean changes in the job seeker's circumstance or motivation may have occurred.

In addition, it was the intention for the same provider who completes the discovery to serve the referral. Ideally, also the same staff member when possible. At times, discovery services would be completed by one provider and then referred to another provider for the customized employment process. It is a vulnerability, because without a quality vocational profile or an in-depth knowledge of the job seeker, it is challenging to make progress.

Another external challenge is a lack of understanding of the process used by providers to facilitate customized employment. It is an important piece, because we don't want to discourage or confuse job seekers who may have received different information to set ideas about what may be expected.

In Florida, another challenge is that to provide customized employment services, you must be a contracted supported employment provider. The contract specifies services outside of an IPE goal are not authorized, which is in conflict with the exploration of multiple vocational scenes following discovery. Providers are then hesitant to provide services outside of the goal and take the risk. At the same time, many counselors are hesitant to complete additional administrative responsibilities to amend goals without the certainty of success after the goal change. So it can become a catch-22.

Some additional external challenges include use of tools that may help facilitate a customized employment opportunities such as OJT. In Florida, it is a cumbersome process. And there are delays in wage reimbursement to employers, which diminishes the effectiveness of the strategy. Similarly, under-utilization of self-employment services within Florida VR limits potential customized employment opportunities.

(Slide 51) Despite our best intentions, there were several internal challenges our agency also faced. Let's talk about some of what we experienced within our own organization. Florida vocational rehabilitation asks for staff credentials to revolve around counseling and social work backgrounds in order to provide direct services to consumers. We received some resistance internally about engaging the business community in a different way, because it was a skill set outside of a comfort zone for many staff members who viewed themselves solely as advocates in the employment process. It is a challenging mindset to overcome.

In addition, it was also challenging to identify and provide training opportunities that would assist staff members in gaining confidence and develop necessary competencies.

Another primary challenge has been consistency with production of quality vocational profiles to be a usable and comprehensive product. Discovery specialists do not always have the specialized training regarding medical considerations or implications of a particular disability. Therefore, important information was not readily available. And supports needed were not adequately addressed in the profiles.

Within our own organization, we tried implementing discovery and customized employment services in various ways-- as separate services performed by different staff and as one service provided by the same staff. We experienced challenges with both.

When performed by different staff members, the continuity of service and transfer of knowledge was sometimes a challenge. Referrals were insufficient. And the time to complete the process was too long to support the service flow.

When one staff member was providing both discovery and customized employment services, there were challenges with effective case management principles to deliver services in a timely manner while balancing services to job seekers who may not have needed as much time or resources.

Lastly, service providers are not immune to gravitating towards what is known and comfortable. When staff perceive the customized employment process as intimidating, too challenging, or beyond their abilities, individuals needing those services received lower priority or minimal services as an unintended consequence.

(Slide 52) So what do we think that we learned as providers? Customized employment is a very important service. And there have been many learning opportunities along the way in our own attempts to deliver a quality and meaningful service. For example, there is likely to be greater success in achieving outcomes if there were providers that could specialize in the service. Additional training opportunities would also help providers develop necessary competencies and feel more confident in delivering services.

Increasing the availability of technical assistance and benefit planning supports would be helpful in navigating some of the more complex challenges to helping a person with a disability be successful in employment. Greater partnerships, understanding, and collaboration between VR staff and providers would likely facilitate an increased timely outcome.

Lastly, the rates that are paid for customized employment services should be revisited to ensure that incentives are sufficient to motivate providers to offer the service. Otherwise, providers will continue to focus on individuals who can secure employment via traditional methods that don't demand the same time, resources, skill development, and creativity as the customized employment process.

Tammy?

(Slide 53) TAMMY JORGENSEN SMITH: Thank you, Vanessa. We've been asked to provide each panel member's perspective on these practice guidelines. Number one, do you believe the practice guidelines or written guides will be a helpful tool for VR practitioners to implement customized employment practices? If so, what are the benefits of having practice guidelines?

Number two, what type of information should such a guide include? And number three, who should be involved in developing such a guide?

A written guide will be very useful in practice. USF was recently awarded federal funding to conduct a randomized controlled trial testing customized employment strategy with adults who have been diagnosed with autism. This provides an opportunity to develop a protocol for implementing the customized employment process with fidelity to the model. If successful, customized employment will be able to be noted as an evidence-based best practice.

In addition, we will have a useful written guide that can be used in training and practice. The implementation guide developed through the grant will include a step by step procedure for each part of the customized employment process. It will also include a valid and reliable fidelity scale to help ensure quality and consistency in implementation. The protocol or guide developed through the grant will have input from a variety of subject matter experts and other stakeholders who will participate on the project advisory committee.

These stakeholders include representatives from the state and local VR offices, community-based provider agencies, and other organizations that use this customized employment process, self-advocates, and family members.

Jose and Wayne?

WAYNE OLSON: Practice guidelines and written guides can be very helpful for practitioners to implement customized employment, because the amount of information and practice itself is very time consuming and rather daunting, especially for the beginners. It can also go off course if you don't have guidelines to keep you true to the integrity of the process. As the practice would be used by many, there need to be guidelines to keep the practice consistent.

A reference to be able to go back to is very appealing for those just beginning and for those who have done discovery for some time now. The guide should include the discovery philosophy and perspective, best practices based on the customized process. It should also include the pitfalls to avoid, the do's and don'ts that we have covered earlier, and the discovery vocabulary.

People or organizations that should be involved include Mark Gold and Associates, Griffin Hammis Associates, vocational rehabilitation, contract providers, and educators in the field of rehabilitation counseling.

Vanessa?

VANESSSA RODRIGUEZ: Thanks, Wayne. Like my colleagues, I also believe that practice and implementation guidelines would be helpful for providers in the field being asked to provide these services and facilitate outcomes. It can be a very intimidating process for some direct service providers to switch gears from advocacy to the development of skills required to customize or create jobs.

There is sometimes a comfort in presenting the individuals that we serve as solutions without truly understanding the business's needs or challenges that would help facilitate a proper employment match. However, the process of customizing employment requires competencies and observation, active listening, and problem solving in non-traditional ways.

I agree with my colleagues on things that should be included in the guide, especially the dos and don'ts, and steps to implementation. Of equal importance, in my opinion, is that the guide is practical and provides examples.

For example, many of my colleagues working at other provider agencies have shared that they shy away from customized employment, because they don't really know what or how to ask the employer's questions to get at the root of what their priority needs are or opportunity areas may be. In developing practice guidelines, it would be helpful to include perspectives from various stakeholders, as my colleagues have also suggested.

In my opinion, diversity of perspective will greatly contribute to facilitating an in-depth understanding of the nuances of the customized employment process in order to develop a guide that will be usable and demystifies many of the challenges to implementation. Beyond guidelines though, continued training and development support will be instrumental in ensuring that customized employment practices are embraced by the community service providers.

Tammy?

(Slide 54) TAMMY JORGENSEN SMITH: As mentioned earlier, action planning helps to bridge the gap between knowledge and practice. Please take the time to contemplate these questions and to begin developing a plan to integrate the customized employment process in your community, or to improve and expand the processes that have already begun.

We hope that the information that we shared today will be useful to you as you integrate customized employment strategies to increase competitive, integrated employment outcomes. Thank you for your time.

(Slide 55) REFERENCES

(Slide 56) CINDY CAI: Thank you so much Tammy and the panel. This slide lists the references used in the presentation today. So we encourage listeners to check out these resources to learn more information about WIOA and customized employment strategies.

So I'd like to thank the panel again for such an informative presentation with our audience today. I'd like also to remind and encourage everyone to fill out the brief evaluation form shown at the bottom of this slide. We'll email it to all who registered. The evaluation helps us to plan future events. We have applied for CRC, Continuing Education Unit Credits, for this webcast. And your evaluation is required for you receive your verification of completion form if we are approved.

Once again, I'd like to thank our presenters for their time in preparing this presentation and my colleagues, Rebecca Gaines and Ann Outlaw at AIR for their support. I'd also like to thank the National Institute of Disability, Independent Living, and Rehabilitation Research Network, for providing funding for this webcast.

On that final note, I'd like to conclude the webcast. We'll look forward to your participation in our future events. Thank you.