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

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**Title slide template:** Blue background with American Institutes for Research (AIR) on the bottom of the page, underneath AIR logo.

**Slide 1: Title**

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

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**Slide 2: Presentation Agenda**

* Welcome and Introductions from Panel
* Customized Employment and WIOA Overview
* Customized Employment Process
* Implementation/ Integration Process
* Vocational Rehabilitation Perspective
* Community- Based Provider Prospective
* Challenges and Lessons Learned
* Practice Guidelines

Tammy - Today’s presentation will include information on effectively integrating provisions of the Workforce Innovation and Opportunity Act into public vocational rehabilitation 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 had 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 vendor. The webcast will also include information on a customized employment certification process that has been developed to train community-based providers and 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: Presentation Panel**

Wayne Olson, VR Area Director: A photo of a middle-aged man with glasses

Jose Rivera, VR Discovery Liaison: A photo of a man with a beard

Vanessa Rodriguez, VP of TDI: A photo of a young woman with black hair

Tammy Jorgensen Smith, Ph.D., USF Associate Professor: A photo of a woman with blond hair

Tammy – To begin, we would like to introduce ourselves to all of you.

Wayne – Hello, my name is Wayne Olson and I am the Area Director for the Division of Vocational Rehabilitation in Central Florida. I have been with Florida VR 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 – Hi, I’m Jose Rivera. I am the Contract and Discovery Liaison for the Florida Division of Vocational Rehabilitation, Area 3. 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 Vocational Rehabilitation staff and contract providers in all aspects of the Discovery process.

Vanessa – My name is Vanessa Rodriguez. I currently serve as Vice President of The Diversity Initiative, Inc. (TDI) a Supported Employment Community Service Provider serving Vocational Rehabilitation Areas 3 and 4. 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 – And I am Tammy Jorgensen Smith. I earned my master’s degree in Rehabilitation Services from Florida State University, my Ph.D. in Counselor Education from Barry University and I have been a Certified Rehabilitation Counselor since 1999. I joined the University of South Florida in 2007 as a Research Assistant Professor with Florida Center for Inclusive Communities. Currently, I am a tenured Associate Professor in the Rehabilitation and Mental Health Counseling Program. My research focuses on the development and implementation of innovative, customized employment (CE) models to promote full inclusion and self-determination for people with disabilities.

**Slide 4: The Philosophy**

Image with text saying: It is our belief that all people should be accorded an equal degree of acceptance, personal freedom and opportunity for individual growth and development

* Employment First
* We are helpers by nature
* Promote independence & self-determination
* Promote quality of life through meaningful activity and community integration

Tammy – 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 the wages earned by others doing similar work.

Most of us 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 VR 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 promotes quality of life through meaningful activity and integration into the community.

**Slide 5: Why Customized Employment?**

* Promotes the identification of interests, talents, and conditions for employment
* Facilitates people with complex disabilities in attaining their employment goals when traditional strategies are not successful
* Assists in the implementation of job accommodations that promote employment retention

A graphed image is shown of a brunette woman in a yellow suit sitting and working in front of the computer with a lavender background.

Tammy - 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, families 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-behavioral 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 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, integrated employment goals due to the complexity of their disability. It is not a new concept or process as these strategies have been demonstrated to be successful for decades. Like many innovative approaches, it takes time to get to the point of systems change. As for customized employment, that time has come and we now have the opportunity to utilize these strategies to improve successful rehabilitation rates for VR consumers with the most complex disabilities.

**Slide 6: Socio-Ecological Approach**

Acknowledges the complex interplay between a person and his/her environment

A hierarchical and colorful model is shown with elements from top to bottom: The highest element is Systems (Laws, Policies, Practices), followed by Community (Social Networks, Support Systems), Interpersonal (Family, Peers, Connections) as third, Individuals (Interests, Talents, Skills) as the fourth element at the bottom.

Tammy - The customized employment process is grounded in social-ecological theory in that it acknowledges the complex interplay between a person and the environment. It 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 capacities, disposition, and interaction style while also recognizing contextual factors such as living arrangements, geographical location, support systems, connections, and resources to help facilitate an employment outcome that aligns with the individuals interests and talents while considering conditions that may impact successful, long-term employment.

**Slide 7: WIOA**

Section 361.5(c)(15) of the **Workforce Innovation & Opportunity Act** (WIOA) specifically identifies customized employment as an employment outcome under the public Vocational Rehabilitation program.

Tammy - As seen in the previous figure that illustrates the socio-ecological approach, the macro level or outside ring is the systems component which includes laws, policies, and practices. The primary reason for integrating customized employment strategies into the VR system is for its 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**

Defined by WIOA as:

“competitive integrated employment, for an individual with a significant disability based on an individualized determination of the strengths, needs, and interests of the individual with a significant disability designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer carried out through flexible strategies.”

(Civic Impulse, 2015, p. 573)

Tammy - Customized employment is defined by WIOA as: “competitive integrated employment, for an individual with a significant disability, that is based on an individualized determination of the strengths, needs, and interests of the individual with a significant disability, designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer, and carried out through flexible strategies.”

**Slide 9: CE Process**

* Considers unique aspects of each person (age, type of disability, functional capacities, disposition, interaction style)
* Recognizes contextual factors (resources, living arrangements, geographical location, supports)

Facilitates an employment outcome that aligns with the individual’s interests and talents while considering conditions that may impact successful, long-term employment

Tammy - As mentioned earlier, the customized employment process considers unique aspects of each person such as age, type of disability, functional capacities, disposition, and interaction style. Customized employment also recognizes contextual factors including resources, living arrangements, geographical location, and services and supports 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: Customized Employment Process:**

An image of a circular model is shown with elements that are captured in diamond-shaped hexagons on blue background. In the middle it says Job Seeker. Surounded by circulated elements, in clockwise direction it starts with Vocational Profile, followed by Customized Planning, Portfolio-visual Resume, Job Development and Negotiation, Accommodations and Post-employment Support and Discovery

Tammy - 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, interest, and support needs.

**Slide 11: Step 1 - Discovery**

* Discovery uses qualitative methods (interviews, conversations, observations) in natural settings to gather information about the job seeker’s interests, talents, and conditions for employment
* Alternative to traditional evaluations that use prescribed testing and comparisons to norms and general standards

Tammy - Discovery is a type of naturalistic assessment that uses qualitative methods to gather information useful in building a narrative snapshot of a 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 traditional vocational evaluations. A person with limited speech will likely have difficulty with vocational inventories and 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: Step 2 – Vocational Profile**

An image of a writing pad is shown with an undecipherable graph.

Vocational Profile:

* product of Discovery
* a robust, narrative snapshot of a job seeker to identify ideal working conditions
* Non-evaluative; presents information from a strengths-based perspective

Tammy - The vocational profile is the product of the Discovery process. It is a document that provides a robust, narrative snapshot of the 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 of 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 interest, skills, and talents.

**Slide 13: Step 3 – CE Planning Meeting**

An image of four hands holding each other’s wrists to form a closed square is shown

* CE planning meeting includes the job seeker, family, friends, advocates, service providers, VR counselors, and other stakeholders
* Ideally, it occurs within two weeks of the completion of the Vocational Profile
* Purpose is to develop a CE blueprint that bridges the gap between Discovery and job placement

Tammy - The customized planning meeting should take place within two weeks of the completion of the Discovery process. This meeting involves the 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 goal. The blueprint contains the employment goal (or up to three prioritized employment options), the action steps 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: Step 4 – Visual Resume**

An image of a resume with a pen is shown.

* Visual Resume - a sales tool to introduce the job seeker to potential employers
* Differs from a typical resume in that it utilizes photos or video clips to present the job seeker to the employer

Tammy - 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 for 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: Step 5 – Job Development & Negotiation**

* Identification of unmet business needs that may be fulfilled by the talents of a job seeker
* Negotiate the job description using customizing strategies
* Include needed accommodations and supports in the negotiation process.

Tammy - 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 a job seeker to the needs of an employer. This negotiation results in a job description that outlines a customized relationship between employer and employee. Options for customizing a job description include job carving, task reassignment, job creation, and job sharing. Other points of potential negotiation include job supports, the hours or location of the job, or specifics of supervision.

**Slide 16: Step 6 – Accommodations & Post Employment Supports**

* Job Accommodation Network (askjan.org) aid in the identification/implementation of accommodations as required by the Americans with Disabilities Act.
* Prior to vocational rehabilitation case closure, assistance should be provided in the development of natural supports and resources for targeting solutions to challenges prior to the loss of employment.

Tammy - Job placement does not always equate to successful employment. It is 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 supports. Both employees and employers should be aware of the services available through the Job Accommodation Network (askjan.org) to aid in the identification and implementation of accommodations as required by the Americans with Disabilities Act. It is also important to facilitate the development of natural supports and resources that can be utilized to target solutions to problems that may arise while 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 an issue that could have been resolved.

**Slide 17: Implementing with Fidelity**

* Learning to apply the CE process with fidelity to the model requires time and practice combined with training and technical assistance from a person with expertise in the process.
* States/systems should take this into consideration when incorporating CE strategies into their service options

Tammy - Learning to apply the CE 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 the strategies are implemented by highly trained, competent providers. States/systems should take this into consideration when incorporating CE strategies into their service options.

Several fidelity instruments have been developed for 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 a Discovery Fidelity Scale that can be used by all for training and quality assurance.

**Slide 18: Ideal vs Pragmatic Implementation**

A model of a Vocational Rehabilitation Process Model is shown:

Integration strategies are being presented in two formats: ideal and pragmatic.

Ideal Implementation to the left-hand side starts with Discovery Process at the top with an arrow pointing down to the element of Customized Employment progressing to IPE Development/Service Planning (Based on Vocational Profile and end at the bottom with Customized Employment Services (Job carving, negotiation)

In the middle, a set of factors connects with arrows to both sets of elements at the left-hand side and right-hand side. It starts from the top with Application Referral, Progresses to Orientation/Initial Meeting, Evaluation, and Eligibility - from Eligibility one arrow points to the status of Ineligible where a stop is indicated – in case of eligibility it continues to Service Provision, goes down to Job Placement and ends with Post Employment Services/Closure. The right hand-side model represents the Pragmatic Implementation. It begins with Traditional Vocational Evaluation and continues to IPE Development/Service Planning, proceeds to Traditional Services and ends with IPE Amended to include Discovery Process, Customized Employment Planning and Customized Employment Services.

Both the left-hand side and right-hand side sets point to Job Placement after Customized Employment Services.

Tammy – 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 talents. Therefore, implemented properly, no person would be found to be “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: Why Not Ideal Approach?**

* 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 must adapt their policies and process, train staff, identify additional resources, and moderate resistance that may add to the issues of turnover and burnout.

Tammy – 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 expense 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 process, train staff, identify additional resources, and moderate resistance that may add to the issues of turnover and burnout when implementing WIOA provisions.

**Slide 20: Pragmatic Approach**

Discovery is added to Individualized Plan for Employment (IPE) as an amendment when traditional strategies have not resulted in competitive, integrated employment

A black and white caricature-like image is shown of a person sitting in front of the computer

Tammy – To implement customized employment strategies in a more pragmatic way, Discovery is added to Individualized Plan for Employment (IPE) as an amendment when traditional strategies have not resulted in competitive, integrated employment. The reason that this approach is not ideal is that many applicants with the most significant disabilities are determined ineligible for VR services based on traditional vocational evaluation. For example, a person with autism and limited speech may not fare well in the prescribed environment of a 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 an 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: Implementation of CE Strategies**

Successful implementation involves educating all stakeholders, training service providers, and monitoring and evaluation of activities to promote ongoing quality in service provision.

It is recommended that public VR systems:

1. utilize a phased approach;
2. develop success measures for project activities;
3. develop a work plan with timelines;
4. employ strong project management; and
5. conduct a comprehensive evaluation

Tammy - Integration of customized employment strategies into VR systems necessitates both organizational and system 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 by the core implementation team; a solid action plan for implementation and expansion and ongoing evaluation to ensure the practice is effective and producing the desired outcome.

**Slide 22: Tools to Facilitate Integration**

Three tools can be utilized to facilitate planning, project management, and evaluation:

1. Roadmap
2. Integration Scale
3. Community of Practice

For more information on the integration tools and process, please read the linked article:

<http://dps.sagepub.com/content/early/2016/04/18/1044207316644412.abstract>

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 practices Areas assessed include 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 Studies. An access link is provided on this slide.

**Slide 23: VR Counselor Role**

Refer:

* Identify consumers who have not been successful through traditional strategies
* Refer to a certified vendor for Discovery service

Review:

* Review the vocational profile for quality
* Utilize the translated information to amend IPE (when needed)

Place:

* Refer the consumer for CE placement services
* Whenever possible, use the same vendor that provided Discovery

Tammy - So, now that we have covered the steps of the customized employment process, let’s talk more specifically about the role of the VR counselor. 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 is 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 their translation to potential employment opportunities that are feasible for the consumer. The information in the profile can be utilized to confirm the employment goal on the IPE and 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 is 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 seeker 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 has 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 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 their communities and the workforce.

**Slide 24: Vocational Rehabilitation Perspective**

VR Discovery Guidelines & Considerations

An image of a purple VR symbol is shown.

Tammy – 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 service for Florida VR consumers.

Wayne – 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 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 Consultant to lead this 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 Marc Gold and Associates (experts in the customization process). The pilot started with 7 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 9 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: Vocational Rehabilitation Perspective**

**DISCOVERY**

What it IS:

* Based on the belief that everyone can work.
* An in-depth study of one job seeker.
* An alternative to comparative, standardized assessment and evaluations.
* A foundation for customized employment planning.
* A process compatible with principles of person-centered planning, self-determination and informed choice.

What it is NOT:

* An evaluation of a comparison with standards
* A prediction of success based on performance
* A tool to identify areas that a job seeker needs to change
* A fast process – it takes at least 16-20 hours to complete the Discovery process
* The end of the customized employment process – planning and job development follow Discovery

Wayne-In Florida State Vocational Rehabilitation Customized employment begins with the Discovery process.

Wayne-let me walk us through our VR Discovery Guidelines and Considerations.

Wayne- Before we begin, this slide is a recap of what Discovery is and What it is Not. Discovery assumes that everyone can work. There is no passing or failing so it is not an assessment in the traditional sense. It is getting to know the person to dig up the information that is already there that may not have been known.

Review the two lists.

**Slide 26: Consumer Considerations**

A black and white caricature-like image is shown with two people in an office where a female is sitting at the desk, writing on paper, while talking to a man to indicate a one-on-one meeting.

* Employment must be the goal.
* Consumer must be eligible for Supported Employment.
* Must be available and committed

Jose- 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 an 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: Vendor Considerations**

* Provider must be registered as a Supported Employment Vendor.
* The Specialist must be Discovery Certified.

Jose- Vendor Considerations: A vendor must be registered as an SE provider with Florida DVR 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.

A green check mark symbol within a green circle is shown.

**Slide 28: VR Counselor Considerations**

An image of lined paper on a clipboard is shown.

Two authorizations:

1. A10770 (Profile)

* $1750

1. A10790 (Hours of Observation)

* $39 per hr. up to 15 hours
* Supporting documents
* Timelines

Jose- VRC 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 reports, 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, 6-8 weeks is the target timeframe 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: VR Counselor Considerations**

There are questions a VRC should ask themselves to determine the appropriateness of a Discovery referral:

* Due to the nature and intensity of the process.
* To maximize the benefit of the process for the consumer.
* To receive quality information that will be a tool for employment planning.

A blue question-mark symbol with a confused face on the dot is shown.

Jose- the Discovery process is intense and personal. In order to maximize the benefit of Discovery and receive quality information, a VRC should consider the following questions. Next slide.

**Slide 30: VR Perspective**

1. Is employment a priority for the consumer and those who support him or her (when applicable)?
2. Does the consumer understand that Discovery will create a blueprint for success in employment?
3. If actively seeking employment, is the consumer willing to suspend a job search to participate in the Discovery process?
4. Will this person be available to participate (i.e. not going on vacation, available during business hours)
5. Will this person be undergoing major life changes soon that would impact the picture of who they are? (i.e. a move, a graduation, a divorce, etc.

Jose- Some questions to consider, Is employment a priority for this consumer? If actively seeking employment, is the consumer willing to suspend a job search to participate in the Discovery process?

**Slide 31: VR Perspective**

1. Are there any pending considerations that will impact the candidate’s ability to be reliable or dependable throughout the process? (medical, legal, vacation, etc.)
2. Will the individual allow access to supports (when available)?
3. Will the individual (and supports, where applicable) allow access to the home?
4. Does the person have a legal guardian that needs to be consulted as part of the process?
5. Does the person have the necessary accommodations to participate in the process?

Jose- 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.

**Slide 32: VR Perspective**

Components of Discovery:

* Meet & Greet Appointment
* Hours of Observation
* Conversations
* Profile Writing (or Discovery Staging Record)
* The Planning Meeting

An image of two people sitting in two seats is depicted. One male with glasses is looking at a brunette female and is talking to her, possibly indicating counseling her.

Wayne- Once a consumer is referred to a Discovery/Supported Employment vendor, the components of Discovery Services are the Meet & Greet, Hours of Observation, conversations, the profile/staging record writing, and the planning meeting.

**Slide 33: Meet & Greet Appointment**

Purpose:

* Review the components, products and goals of the process
* Reinforce the participation expectations of and secure commitment from the consumers and their supports (where applicable) throughout the process
* Establish timelines and next steps
* Identify any barriers to a successful Discovery process
* Begin conversations and rapport building with the individual
* Discuss preliminary information used in the vocational profile or staging record
* Orient the VRC to the projected completion timelines and include them as partners in a successful process

Wayne- 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 supports, when available. 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 the particular specialist as a VRC, it is highly encouraged to participate in the meet and greet appointment. Discovery works best when VRCs are an active partner in a successful discovery experience. Additional benefits of participating are covered in this slide.

**Slide 34: Hours of Observation**

An image of a triangle is depicted, with the title “The Iceberg Analogy of Discovery.” The triangle is supposed to be an iceberg, and is divided by three horizontal lines into four sections. There is a red arrow pointing to the top section, with a box of text next to it reading “What we usually know about the people we try to assist – just the top of the iceberg.” To the right of the triangle iceberg is a cartoon purple fish swimming. There is a red arrow pointing to the bottom section, with a box of text next to it reading, “We need to know much more.”

Activities

* Logged in an activity log

Types

* Familiar
* Novel (Unfamiliar)

Setting

* Home
* Community\*

Jose- 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 the 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 & 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 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 job (i.e. environment, accommodations, supervisory styles, etc.).

**Slide 35: Conversations**

An image of a head is shown where a magnifying glass is zooming into a piece of brain.

Some discovery information is gathered through conversations with the individual and people who know them best.

* Family
* Friends
* Service providers
* Teachers
* Employers
* Community Members who know the person well and can contribute to the Discovery process

Jose- 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/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: Vocational Profile**

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 successful employment planning
* Distinct from an IPE

An image of a notebook is shown with a pen

Jose- Based on information gathered through observations and conversations, as well as a review of available documentation, a vocational profile is created.

**Slide 37: Quality Vocational Profiles**

* Focused on abilities and skills (optimistic and person-centered)
* Rich, Robust and Comprehensive
* Objective (free of judgment)
* Non-evaluative (free of comparisons to others)
* Respectful
* Identify 3 vocational themes (at minimum)
* Identify barriers, strategies and potential solutions
* Include employer lists

Wayne: 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.  The narrative should be comprehensive (rich), 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 narratives 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 VR.  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.

**Slide 38: The Planning Meeting**

The planning meeting is where employment planning occurs with:

* The Consumer
* Family
* Friends
* Advocates
* The Provider
* The VRC
* Others chosen by the job seeker

Jose- The planning meeting belongs to the individual and is where employment planning begins. It is often necessary to determine who holds “trumps” at the meeting. No more persons paid 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 – 12 people maximum, so space considerations may need to be made.

**Slide 39: The CE Planning Meeting**

A black and white caricature-like image is shown of a meeting where people are sitting at a round table one person is standing and pointing at a board.

* Transition point from Discovery into Supported Employment

Jose-This process is something like homebuilders 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.

**Slide 40: Challenges**

* VR Staff and Provider acceptance of Discovery perspective and process
* Timeframe expectations for process completion
* Inadequate compensation for Provider
* VRC’s comfort level with the process and final product
* Lack of consistency per Provider
* The Pilot’s consumers were some of the consumers with the most complex disabilities
* Many of our counties do not have Discovery Certified Individuals

Wayne- Let’s talk about the challenges…

Wayne- When we first began promoting Discovery in our Area we found that the Providers and VR Staff were not so accepting of this new way of thinking about consumers and their employment potential. Everyone can work is the cornerstone to the Customized Employment process. This was rather challenging since we are talking about changing the way VRC’s and our Providers thought about the consumers we worked with, especially those that in the past would be considered too severe for competitive integrated employment in the community.

Wayne- We found it was difficult and still is difficult for providers to consistently complete the Discovery piece within the 6-8 week timeframe.

Wayne- Some providers felt and still feel they are not adequately funded for this particular service because of the process expectations.

Wayne-We have found many VRC’s do not feel confident in their ability to approve or disapprove a completed Discovery product.

Wayne- There is a definite lack of consistency per provider when it comes to the finished product.

Wayne- In hindsight we probably should have begun the pilot with consumer’s with less complex disabilities. There is a learning process with Discovery and it was unfair to give our vendors some of our most complex cases.

**Slide 41: Lessons Learned**

* Need for subject matter experts in each region
* Need for in-depth VRC Training in the process
* Need for re-certification process for Providers
* Need for an agency certification to go along with it
* Need for a dedicated Discovery Certified Individual
* Need for a Fidelity Scale
* Need to be patient

Jose- We have learned from our eight year journey with Customization that their should be at least one very well trained subject matter expert in each area. An in-depth training for VRC’s 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.

Jose- 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.

Jose-Finally, a systemic and philosophical change like this one does not happen overnight. Those proponents of customized employment must not yield to any push back from those that do not want to give this process its’ due. Just keep moving forward as slowly or quickly as you can.

**Slide 42: Community-based Provider Perspective**

**Provider/ Vendor Perspective**

Jose or Wayne – We will now turn things over to Vanessa so that she may provide the Vendor perspective.

A graphic with the words “the Diversity Initiative” is surrounded by a few colorful rounded lines.

**Slide 43: Customized Employment: Provider Perspective**

A model of a blue arrow into the right direction is shown with 5 blue rectangles is shown.

Staring from the left with the element of Discovery, Individualized Career Plan, Consumer Engagement and Business Development Activities, Customized Employment, Retention Services

Vanessa- Hello everyone. Thank you for having me. On the 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 revisiting the graphic on the screen that illustrates the coordinated provider services that facilitate Customized Employment via Supported Employment Referral in 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 DVR colleagues about how the Discovery process is facilitated within Florida VR. To recap, Discovery certified staff (sometimes referred to as a Discovery Specialist) within a Supported Employment contracted service provider receive authorizations to provide the Discovery service. In general, the Discovery Specialist will then reach out to the individual and facilitate the Discovery process and produce the vocational profile. The Vocational profile is then used by the VR counselor for planning and the Individual Plan for Employment goal (also known as the IPE). A provider (in ideal cases- the same one that 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 is an Individualized Career Plan. This is a distinct service from the Discovery Process but utilizes the information obtained in Discovery. Following the ICP is engagement of consumers and businesses in activities leading towards a successful long-term customized employment experience.

**Slide 44: Customized Employment: Provider Perspective**

Customized Employment is:

* A flexible process
* Distinct from traditional employment
* Individualized
* Personalized
* Value-driven

Vanessa- 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 that do not have disabilities. However, in recent years more concrete information of how customized employment may be achieved successfully for Job Seekers with Disabilities has been made available through many concerted efforts across the nation. This slide highlights some of the foundational aspects of Customized Employment. It 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. 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 Placement Provider- but it is a process that takes time. The process is individualized, as 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 opportunities 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.

Examples of customized employment include carved positions, job sharing or creation of jobs that never existed before. It is important for 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.

**Slide 45:** **Customized Employment: Provider Perspective**

Examples of Customized Employment Arrangements

Traditional Employment Relationships:

* Task reassignment (Job Creation)
* Job carving (Job modification)
* Job sharing

Other Customized Employment Opportunities:

* Business within a business
* Resource ownership

Vanessa- On this slide, you will see examples of types of Customized Employment arrangements that providers may help facilitate for individuals served or guide them in achieving depending. The first 3 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. Task reassignment 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 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. These types of employment arrangements typically are employer-employee relationships. Another type of Customized Employment arrangement that may be facilitated, is as a business within a business- which may be a result of a Supported Self-Employment service. 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: Customized Employment: Provider Perspective**

The Universal Hiring Rule

**Any employer will hire anyone, as long as the hiring will bring more value than cost.**

An image of three males is shown, with two men greeting each other and talking and another man approaching them in the background.

Vanessa- As we touched on earlier, an important element of Customized Employment is a personalized, mutually-beneficial relationship between the Job Seeker and businesses. The universal hiring rule is the key to 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.   Some ways to demonstrate value include that the hiring will increase profits, decrease costs, reduce turnover, increase productivity, etc.

**Slide 47: Consumer Engagement**

* Engagement Activities
* Shifts focus away from “job readiness” to universal employer needs (i.e. motivation, dependability, work ethic, etc.)
* Provides greater information for an in-depth understanding of the Job Seeker
* Exploration of Vocational Themes
* Will assist the Employment Specialist with identifying additional contributions (value) an individual can make to a business and condition.

Vanessa- Let’s just take granted that the job seeker has committed to working and is willing to try their best for the purpose of this slide. 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 readily 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.  When referred individuals need Customized Employment services, service providers facilitate engagement activities that are in one part geared towards monitoring these foundational hiring needs and in other parts geared towards 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 explore 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 and will review shortly.

**Slide 48: Business Development Activities**

Informational Interviewing

* Less formal process
* Exploratory
* Preparation required
* Insightful questions and observation
* More than one visit

Consultative Matching

* More formal process
* Intentional
* Preparation required
* Insightful questions and observation
* More than one appointment

Vanessa- 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 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, non-profit 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, procedure, etc. An Employment Specialist within a 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: Customized Employment: Placemen**

Traditional Placement Process

* Focus on job readiness
* Resumes
* Applications
* Interviews

Focus on engagement

* Candidate Profiles
* Needs Analysis Meetings or Informational Interviews
* Meet and Greet Appointments

Vanessa- This slide summarizes and contrasts the traditional and customized employment processes.  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 interviewing well.  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: External Challenges**

Primary:

* Rate Structure payment reimbursement is insufficient for the service
* Discovery is integrated into the Supported Employment process

Secondary:

* Lag times and lack of continuity in receiving referrals
* Lack of understanding of Provider processes, services and timelines
* Limitations regarding IPE goals vs. vocational themes
* Cumbersome OJT processes that limit effective use
* Underutilization of Self-Employment services

Vanessa- When our agency started the journey of developing a Customized Employment program, we encountered both external and internal challenges with successful implementation. The primary challenge was that the rate structure payment reimbursement provided by VR is insufficient for the time and resources to provide the service. At this time, there is not a different payment available for a customized employment outcome. The inadvertent consequence has been that it drives time and resources to be allocated towards individuals that do not require as much to be prioritized. The state is working on this from my understanding.

Another primary challenge is that Discovery is not part of a seamless Supported Employment experience within FL VR. 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 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 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 themes following Discovery. Providers are then hesitant to provide services outside of the goal and take the risk and many counselors are hesitant to complete additional administrative responsibilities to amend goals so it can become a Catch 22.

Some additional external challenges use of tools that may help facilitate a customized employment opportunity, such as OJT. In Florida, it is a cumbersome process and there are delays in wage reimbursement to employers which diminishes the effectiveness as a strategy. Similarly, underutilization of self- employment services within FL VR limits potential Customized Employment Opportunities.

There are also some additional considerations, which are secondary. One is that

When we first began promoting Discovery in our Area we found that the Providers and VR Staff were not so accepting of this new way of thinking about consumers and their employment potential. Everyone can work is the cornerstone to the Customized Employment process. This was rather challenging since we are talking about changing the way VRC’s and our Providers thought about the consumers we worked with, especially those that in the past would be considered too severe for competitive integrated employment in the community.

Wayne- We found it was difficult and still is difficult for providers to consistently complete the Discovery piece within the 6-8 week timeframe.

Wayne- Some providers felt and still feel they are not adequately funded for this particular service because of the process expectations.

Wayne-We have found many VRC’s do not feel confident in their ability to approve or disapprove a completed Discovery product.

Wayne- There is a definite lack of consistency per provider when it comes to the finished product.

Jose- 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 VRC’s 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.

Jose-Finally, a systemic and philosophical change like this one does not happen overnight. Those proponents of customized employment must not yield to any push back from those that do not want to give this process its’ due. Just keep moving forward as slowly or quickly as you can.

**Slide 51: Internal Challenges**

Primary:

* Lack of confidence in engaging the business community
* Insufficient training opportunities
* Lack of quality, comprehensive information

Secondary:

* Challenges with effective case management
* Lack of continuity of service
* Length of time and resources required
* Staff perceptions about execution

Vanessa- Despite our best intentions, there were several internal challenges our agency also faced. Our VR contract requirements ask for credentials to revolve around counseling and social work backgrounds. We received some resistance internally about engaging the business community in a different way because it was a skill set outside of the 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 the quality of vocational profiles to be a useable 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 this. When one staff member was providing the services, there was challenges with effective case management principles to complete the service in a timely manner while balancing services to Job Seekers who may not have needed as much time or resources.

Service providers are not immune to feeling of gravitating towards what is known and comfortable. Another challenge that we experienced is that when staff perceived the Customized Employment process as intimidating, too challenging or beyond their abilities, individuals needing those services received lower priority or minimal services as a consequence.

**Slide 52: Lessons Learned**

**•** Providers specializing in CE would increase outcomes

• Increased training opportunities are needed

• Increasing availability of technical assistance and benefits planning supports would be helpful

• Need for greater partnerships and understanding between providers and VR staff

• Payment reimbursements need to be revisited

**Vanessa-** So what do we think 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 and increase timely outcomes. 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.

**Slide 53: Practice Guidelines**

1. Do you believe that practice guidelines/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?
2. What type of information should such guide include?
3. Who should be involved in developing such guide?

Tammy – Yes, a written guide will be very useful in practice. USF was recently awarded federal funding to conduct a randomized controlled trial testing customized employment strategies 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/guide developed through the grant will have input from a variety of subject matter experts and other stakeholders who will participate on a project advisory committee. These stakeholders include representatives from State and local VR offices, community-based provider agencies, and other organizations that use the CE process, self-advocates, and family members.

Jose and Wayne-

Practice guidelines and written guides can be very helpful for VR Practitioners to implement customized employment because the amount of information and the practice itself is very time consuming and rather daunting, especially for beginners. It can easily 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 those who have done Discovery for some time now.

The guide should include:

* Discovery Philosophy/Perspective
* Guidelines should include best practices based on the customized process.
* Should also include pitfalls to avoid
* Do’s and Do Not’s
* Discovery Vocabulary

People or organizations that should be involved include a Marc Gold and Associates Representative, a Griffin-Hammis Representative, VR representatives, Provider Representatives, and Educators in the field

Vanessa – 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 skills required to create or customize jobs. There is sometimes a comfort in presenting the individuals that we serve as solutions without truly understanding the needs or challenges that an organization may face. However, the process of Customizing Employment requires competencies in 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 do’s and don’t’s 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 employers questions that get at the root of what their priority needs or opportunity areas may be.

In developing Practice Guidelines, it would be helpful to include perspectives from various stakeholders, as my colleagues from VR 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 is 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 Customized Employment practices are embraced by Community Service Providers.

**Slide 54: Action Planning**

1. What is your state/community currently doing to integrate CE strategies?
2. What still needs to be done?
3. Who is involved or needs to be involved (stakeholders)?
4. What are the next action steps?
5. Who will complete them?
6. What are the time frames/ deadlines for completing action steps?
7. Who is assigned to coordination and follow up?

Tammy – 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 processes that have already begun. Thank you for your time.

**Slide 55: References**

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**Slide 56: Wrapping Up**

We invite you to:

* Provide your input on today’s webcast
* Share your thoughts on future webcasts topics
* Participate in the Community of Practice to continue the dialogue

PLEASE CONTACT US:

* **ktdrr@air.org**

*Please fill out the brief evaluation form:*

<http://www.surveygizmo.com/s3/3191782/Evaluation-Integrating-Customized-Employment-Strategies-into-the-VR-System>

**Slide 57:**

Tammy Jorgensen Smith, Ph.D., CRC, University of South Florida, 13301 Bruce B. Downs Blvd. MHC-1632, Tampa, Florida 33612, Phone (813) 974-0973 [tjsmith@bcs.usf.edu](mailto:tjsmith@bcs.usf.edu), <http://flfcic.fmhi.usf.edu/index.html>, <http://rmhc.cbcs.usf.edu/>

Wayne Olson and Jose Rivera , Florida Vocational Rehabilitation, 3555 Maguire Blvd., Suite 205 , Orlando, Florida 32803-3726 , Phone: (407) 897-2725 , [Wayne.Olson@vr.fldoe.org](mailto:Wayne.Olson@vr.fldoe.org), [Jose.Rivera@vr.fldoe.org](mailto:Jose.Rivera@vr.fldoe.org), [www.rehabworks.org](http://www.rehabworks.org)

Vanessa Rodriguez, Vice President at The Diversity Initiative, Inc., 1000 N. Ashley Dr., Suite 805 , Tampa, FL 33602, Phone (813) 446-1644 www.thediversityinitiative.org

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