

The Florida Rural Routes to Employment Replication Manual



Acknowledgments

The *Florida Rural Routes to Employment Project* would not have been possible without the vision, commitment, expertise, and funding of the *Florida Developmental Disabilities Council*. Our hope is that this Replication Readings Manual provides flexible approaches that assist others working to expand individualized community employment opportunities for people with disabilities.

The Replication Manual contains specific components of best practices in Customized Employment (CE) that reflect the use of Discovering Personal Genius/Discovery and effective techniques that “bridge” Discovery, Job Development, and ongoing supports. These readings lean heavily on an Economic Development approach to Job Development and how this methodology benefits the community. The readings manual also includes information on Community Action Teams (CATs), social capital, and the rich connections in rural communities that foster employment. And finally, the Replication Manual identifies specific barriers, resources, and real solutions used in each project site to foster change and achieve quality outcomes.

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PART 1: Overview of Customized Employment for Rural Communities

Introduction

Stop and ask anyone living in small town Florida (or just about any rural community across the country) about businesses or needs in their community, and they will likely respond with an extensive and varied list. “Well, we used to have a printing shop, but the last one closed down two years ago, and no one has managed to open one since. I have to drive several towns over to get my lawn equipment or machinery serviced. And no one has been able to figure out how to make a go of it with any kind of a coffee shop or breakfast place, even though we all keep talking about how much we need one.”

A quick drive down Main Street in any of these communities reveals a series of small local businesses, churches, and banks but rarely a whole lot else. Absent are the big chain retailers and groceries stores. What is also not evident are the myriad small, often home-based, businesses dotting the local side streets that generate employment for many community members. Conversations with these business owners showcase the need for flexibility and creativity to cover the different daily tasks along with the ability to get it all done on a shoestring budget. As the owner of small Italian restaurant recently stated during an informational interview, “It’s all me. All day, every day, it’s all me. I take the orders, I make the food, I serve the food, and I clean up afterwards. My kids can come and help out for a few hours a day. But most of the time, it’s all me.”

The Small Business Administration (SBA) reports that Florida has over 2.1 million small businesses constituting 98.9% of all employers in the state. Florida small businesses employ just fewer than 2.9 million people representing two-fifths of the state workforce. Over 1.7 million of these small businesses have no employees. (www.sba.gov/advocacy)

With all of this work to do, why is it that rural communities seem to be the most difficult to secure good jobs for people with significant disabilities? Certainly there are fewer businesses to choose from in a small town, but then, there are also fewer people with which to compete. So while rural communities may offer fewer obvious choices for seeking out advertised or “open” jobs, there exists plenty of space to create opportunity through a customized employment or economic development strategy.

Common issues impeding employment in many rural communities include:

- *A perceived lack of jobs and career advancement opportunities;*
- *A lack of trained staff in community rehabilitation and school transition programs;*
- *A lack of adequate funding, or misdirected funding, for community employment;*

- *A paucity of specific staff and consumer training and technical assistance in job development, situational/functional assessment, worksite instructional strategies, natural supports, positive behavioral supports, Social Security Work Incentives, and self-determination;*
- *A lack of management and leadership training and technical assistance to support and guide community employment expansion;*
- *A lack of transportation options.*

There are many definitions of rural. For instance, the Census bureau considers communities an hour from a hub community of 50,000 people to be rural, while other definitions use matrices of population density, educational level, and access to services as measures of rurality (U.S. Census Bureau, 1995; USDA, 2008). In reality, a clear agreement on the “true” definition is not necessary. “Rural” is often as much a state of mind as it is a fact, and doing job development in a small Florida town of 4,000 people an hour from Tallahassee still poses many of the same issues of transportation and economic opportunity and diversity, as does a town of 4,000 in the desert of Utah.

While rural communities face many unique challenges associated with geography, resources, and opportunity, they are also rich in personal connectivity (social capital), in small businesses that dot the landscape, and in the uncomplicated processes of daily life. In many ways, rural job development is easier than in urban communities. It is easy to find and connect with the decision makers in small towns: power is less concentrated and more diffuse across the population; the abundance of small business provides a canvas for economic creativity; and the potential for leveraging social capital through families, schools, local officials, and neighbors is greater given community member’s long histories together. Everyone knows everyone in small communities - or at least everyone knows someone who knows everyone else - and as the old saying goes, when it comes to employment the key “isn’t what you know, it’s who you know”. The opportunity lies in using these natural connections in more strategic and purposeful ways and in recognizing that building employment in rural communities is about creating jobs, not finding them.

This manual derives from the well-established principles and processes of Customized Employment (CE) and details the key strategies, including: Discovering Personal Genius™ (DPG)/Discovery; using informational interviews; revealing Vocational Themes™; deciphering unmet business needs; and leveraging interest-based employment negotiation. Employment professionals throughout the country have demonstrated the effectiveness of CE in communities large and small, urban and rural, for job seekers with a variety of disability labels and support considerations. CE aligns with other economic development approaches, making it a natural fit in rural communities where employment options are often limited and small businesses are undercapitalized. The essential components of CE remain the same regardless of community size, though there are some unique considerations and recommendations

when using CE in rural communities. This manual provides an overview CE along with specific recommendations for customizing quality employment outcomes throughout Florida's rural communities.

Customized Employment Training and Implementation

CE is defined by the U.S. Dept. of Labor as: *a flexible process designed to personalize the employment relationship between a job candidate and an employer in a way that meets the needs of both*. It is based on an individualized match between the strengths, skills, contributions, conditions, and interests of a job candidate and the identified business needs of an employer. Customized Employment utilizes an individualized approach to employment planning and job development - one person at a time and one employer at a time. Self-Employment, job creation, and job carving are all facets of employment approaches used in CE.

CE builds upon the foundational techniques of Supported Employment and has proven well suited for implementation in rural communities. CE differs from traditional supported employment in its reliance upon a mutually beneficial negotiation between a job seeker (and often his/her representative) and the business owner, involving the identification of discrete tasks best performed by a new hire. CE negotiations stem from the identification of unmet business needs and proposed solutions that may result in enhanced efficiency, new products or service enhancements to customers, or the reallocation of other workers to higher revenue producing tasks. Since all of these outcomes result in increased profitability, there is generally a clear understanding that creating the new job is economically beneficial to the employer. Additionally, CE allows for a broader range of employment outcomes, including Resource Ownership™ where a job seeker's contribution of equipment or technology they will use in the performance of their work at the business results in the creation of a wage job, or self-employment. Both of these outcomes support economic development of specific businesses or the broader community as a whole, and therefore tend to be a particularly strong match in rural and/or lower economic areas.

While CE approaches succeed in any environment, rural or urban, they may actually be more easily employed in more remote communities. This is because small companies dominate the rural landscape and the decision makers are easier to reach. As the Small Business Administration (SBA) statistics make clear, small business is the norm in all communities, but again, the leveraging of social and economic capital by community rehabilitation programs, job seekers and their families, and through peer business networks, works exceedingly well in rural communities, and matches the way most people actually get jobs, through purposeful, targeted networking.

Customized Employment also relies on the use of non-competitive, non-comparative employment strategies. Instead of filling out applications and being subjected to job interviews, CE uses community

connections and negotiated approaches to connect with business owners and managers. Again, since businesses tend to be on the smaller side, there is less interference from formal Human Resources (HR) departments or policies that may indirectly screen out applicants with disabilities by comparing them to people without disabilities. The small business dominance of rural and remote communities is an advantage when using CE approaches (USDA, 2008; Goetz, 2008).

This Florida RRTE Replication Readings Manual details the most commonly used tools for achieving success in CE. These pages contain the details for conducting Discovery, using informational interviews, assembling the Lists of Twenty™, initiating interest-based negotiations, and using an economic development approach to circumventing the competitive labor market. Because flexibility is the root of innovation, modifications and adaptations to meet the unique local environment are not just expected, but encouraged. This does not include shortcutting the process, however. ***Customized Employment is the shortcut***; the fastest way devised so far for assisting individuals with significant disabilities in attaining employment of choice. The Competitive/Customized Dichotomy chart below highlights some of the key differences between CE and the more traditional, competitive employment approaches.

THE COMPETITIVE/CUSTOMIZED DICHOTOMY

COMPETITIVE EMPLOYMENT	CUSTOMIZED EMPLOYMENT
Assessment	Discovering Personal Genius™
Train & Place	Place & Train
Chasing Smoke Stacks	Economic Development
Qualified Applicant	Quality Applicant
Labor Market	Job Creation
Help Wanted	Hiring 24/7
Career/Job Trends	GWTCMS/GWTTMS™ (<i>Go Where the Career/Theme Makes Sense</i>)
“Networking”	Leveraging Social & Economic Capital
Win/Lose –Positional	Win/Win – Interest-Based
Fitting In	Conditions of Employment – Ecological Validity
Scarcity	Unlimited Ways to Make a Living
Gratitude	Mutuality
Market Segments	Community
Entry-Level	Resource Ownership™
Comparative	Individualized
Job Descriptions	Vocational Themes™
Human Resources	Shared Interests
Job Search	Lists of Twenty™

COMPETITIVE EMPLOYMENT	CUSTOMIZED EMPLOYMENT
Resume	Portfolio of Skills & Tasks
Smooth Talking	Smooth Listening™
Dependence	Adventure
Rules for Hiring	Improvisation
Big Business	Small Business
Retail	Artisanal
Supervision/Management	Mentoring
Online Applications	Informational Interviews
Business Degree	Business Ideas
Entrepreneurship	Self-Employment

Note that GHA/CSC has trademarked a number of different employment strategies. Please feel free to use these terms in your work, but recognize that they describe very specific proprietary strategies and are not considered generic terms.

Discovering Personal Genius (DPG)

Inherent to any sustainable support approach is proper employment match, meaning that assessment must anticipate proper ecological fitment. In other words, designing employment in terms of the “ideal conditions of employment” reduces the need to create, purchase, or significantly redesign work-related supports repeatedly. The process of Discovering Personal Genius (DPG), which Griffin-Hammis Associates/Center for Social Capital (GHA/CSC) developed for individuals with significant disabilities, is both effective and efficient and involves enlisting existing supports and supporters, and leveraging increased social capital. DPG also reduces spending on formal assessments that have proven unreliable regarding employment for many individuals and opens the door to a greater variety of employment options, including business ownership, as self-determined means of going to work. DPG involves observation and exploration through active participation in various community, home, and work settings that match the individual’s career interests, support needs, family resources, and skills. Unlike traditional vocational assessments, no testing is used, although review of neurological evaluations and psychological factors are sometimes referenced to frame support strategies and to determine the best work match.

DPG is one of several emerging iterations of a process more broadly known as Discovery. Discovery stems from the need to address the fact that recent employment practices, although based solidly in person-centered planning, have not proven overly successful. One key challenge is that the focus of many person-centered approaches is the listing and cultivation of interests. However, interests devoid of related skills, or robust instructional strategies to teach new skills, makes meaningful and lasting employment a tough goal to achieve. Typical among the interests listed for people are: animals, coffee

drinking, music, movies, etc. These are bland at best, and certainly universal likes among human beings. The Discovery process, however, illuminates not only interests but also the accompanying tasks and skills that have specific application in businesses.

The difference between jobs developed on the basis of interests alone versus those developed based primarily on skills is immediately evident. Interest-based employment might lead the job seeker with an interest in animals to become employed sweeping the floors and stocking shelves at a local pet store or cleaning up after the animals at the pet shelter, for example. If DPG revealed that this same job seeker also had strong skills with computers and social media, she might instead manage the customer database and social media outreach for pet adoptions for that same animal shelter or start a small business providing this service virtually for pet adoption organizations throughout the country. Matching the preferred work to existing and teachable skills is crucial and generally leads to higher-paying, more sustainable employment outcomes.

DPG is not used to determine and acquire a dream job or the career of a lifetime. Rather DPG is used to focus on getting individuals into the work arena, be that wage or self-employment, as quickly as possible where they can begin the more long-term tasks of sculpting a career. Therefore, DPG is a time-limited, quick-paced, goal-oriented process with the solid outcome of work that fits the individual and provides opportunities for personal and professional growth. Employment derived from DPG is beneficial to both employee and employer, and is generally developed through establishing relationships with small businesses that are a match for the person's skills and interests, rather than by searching the want-ads for available jobs or calling on more traditional employers. Because of this, DPG often leads to unique vocational situations that are a better fit both for the person and the employer and are less dependent upon extensive support from the employment specialist to maintain.

While several groups have proprietary Discovery processes (e.g. Griffin-Hammis Associates, Marc Gold Associates, The Rural Institute, et al.), all share the premise that employment derives from the creation of profit, and profit is generated by producing goods or services of value to customers, and production requires the performance of skills-based tasks. Again, while interests may help us find a career direction, instruction, application of skills, and mastery play an often-overlooked role in securing solid employment.

Stages of Discovering Personal Genius

The "Discovering Personal Genius Staging Record" created by GHA/CSC frames DPG in four "stages", each with a corresponding array of tasks and observations for the individualized team to take into consideration. Generally speaking, DPG can be accomplished in 20 to 60 hours, over a period of approximately 6 to 8 weeks, sometimes less, and occasionally more, such as when interruptions such as

illness intercede. Current anecdotal data from GHA/CSC sites across the country indicate that DPG is learned by staff through practice and that after a year, the average for DPG when applied to individuals with little or no work history is about 30 hours. DPG should be managed as an urgent team-based task force with specific tasks and timelines identified for each stage. It is critical for managers or supervisors to allocate dedicated staff specifically to Discovery and to prioritize efficient progress through the DPG stages. The importance of this cannot be overstated. Without the buy-in and support of the management team, it is easy for DPG activities to get lost in the shuffle of the myriad other “to-dos” on the typical Employment Specialists’ plate. Efficient progress through the stages is essential because the purpose of DPG is not to decipher all of life’s twists and turns, but rather to build a case for targeted career development. The steps of DPG lead to a vocational profile, captured throughout the Discovery Staging Record (DSR), illuminating at least three (3) solid vocational themes and enough knowledge of the individual to guide the successful development of employment. The complete DSR can be downloaded from the Florida RRTE blog at: http://griffinhammis.typepad.com/florida_rural_routes_to_e/.

The stages of DPG outlined on the DSR include:

Stage 1: Home & Neighborhood Observation

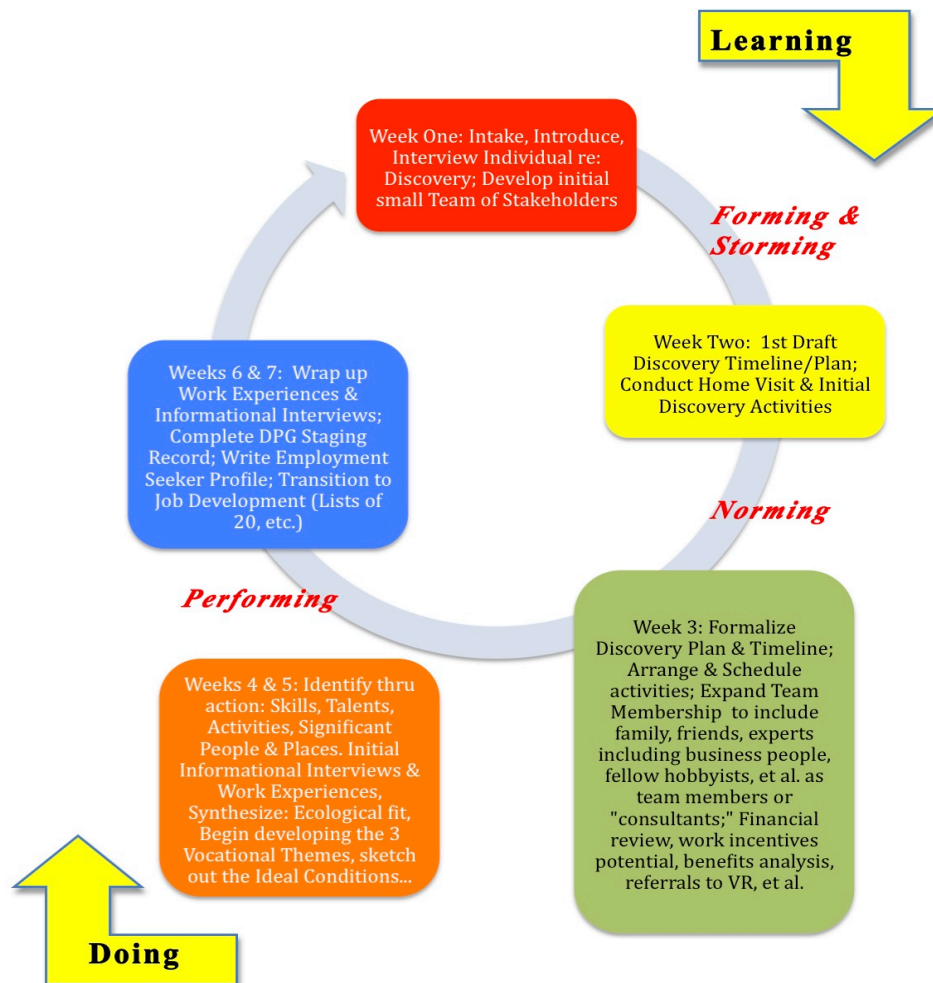
Stage 2: Others to be Interviewed & Discovery Visits/Observations

Stage 3: Vocational Themes, Informational Interviews, & Vocational Profile

Stage 4: Job/Business Development Plan

Each of these stages is summarized in the Discovering Personal Genius Team Process Chart.

**DISCOVERING PERSONAL GENIUS:
TEAM PROCESS CHART**



Griffin-Hammis Associates, LLC

Stage 1: Home and Neighborhood Observation

The basic steps for completing Stage 1 include:

1. **Gather a team** of people. This will include the person assigned to do job development and additional people who can help with the process. Some team members may only be involved in one or two steps. One person should act as team leader, ensuring that the process is thorough and well documented.

2. **Explain** customized employment, the DPG process, and the vocational profile to the individual, family and other significant support people. Be clear about what you will be doing and what is expected of them. Make certain the information you have about the employment seeker is current and complete.
3. **Schedule your first meeting** with the individual and family at the person's home. If meeting at home is not an option or the employment seeker does not wish to meet there, find an alternative location.
4. **Tour the neighborhood** around the person's home observing surroundings, safety concerns, businesses, culture, transportation and services near the person's home. This step may be completed after step 5.
5. **Meet with the individual** and family for 1 to 2 hours in their home. Discuss:
 - a. Daily routines
 - b. Chores and other household responsibilities
 - c. Activities the individual enjoys and engages in
 - d. History of the family/individual, especially as it relates to employment

If the person is willing, have him/her show you his bedroom. Look at how it is organized, what's in it, and what it says about the person. Have him/her demonstrate how he performs chores, engages in activities etc.

6. **Observe interactions, living context, interests and skills.** *Ask yourself if any themes are beginning to suggest themselves and make note of them.*
7. **Ask for names and contact information of people who know the person well.** Ask permission to interview those individuals during Stage 2.
8. **Compile notes from each of the above steps and incorporate into the DSR.**

Smooth Listening™. Throughout Stage 1, the focus centers on listening and observing versus talking or directing. The best way to start the conversation at the home visit, for example, is: "Tell me about yourself." What we learn is that people start these conversations where they believe the important information lies. So we prompt folks to: "tell me about yourself" or "tell me about Joanne." Sit and listen, perhaps take some notes. Do not interrupt the flow with un-needed chatter or reinforcement such as "oh, I didn't know you all took annual vacations" or "that's interesting." The very act of speaking reinforces what was being said and tells the talker that you think this is the important part. This little reward may derail the conversation as the talker now pursues what the listener has indicated is important, but which may have just been a simple statement of fact. When the listener hears something that is relevant, just jot it down inconspicuously and come back to it once the talker is completely finished. No news from the listener is good news and silence prompts the talker to keep talking.

Although questioning is an important aspect of all information seeking, surprisingly rich conversations occur using this technique, especially during the first home visits. There are several questions that do frame the pursuit of knowledge during DPG stages though. We are most interested in finding out who

this person is, and some of the components that will help us sculpt a profile, using interview and observation in a variety of community and work experience settings, include learning:

- *Where this person is most at ease;*
- *When the individual is most in-flow or engaged and by what people or activities;*
- *What supports are needed most in particular situations and how they are best delivered;*
- *Situations and environments to be avoided;*
- *Personal skills, talents, and interests.*

Occasionally conversation stalls out. To prompt more or an increased depth of discussion, priming the pump may be useful using such prompts as:

- *Tell me a bit about chores and tasks done around the house;*
- *Tell me about routine and special family activities or traditions;*
- *Tell me about family vacations or holiday celebrations;*
- *Tell me about major life events that have influenced your son/daughter;*
- *Tell me about events or activities your son/daughter really looks forward to;*
- *Tell me about techniques you've found helpful when teaching your son/daughter something new;*
- *Tell me about your son/daughter's favorite people, such as teachers, clergy, relatives, or neighbors.*

Securing the Benefits Analysis

At this stage, the ES also makes a referral to the state Work Incentives Planning and Assistance (WIPA) project to secure benefits analysis for individuals receiving any form of government benefits. These benefits might include: Supplemental Security Income (SSI); Social Security Disability Insurance (SSDI); Medicaid; Medicare; Food Stamps; housing assistance; and/or Medicaid-Waiver services.

Benefits planning is crucial to successful employment outcomes as it predicts the impact of earned income on benefits and allows the individual to proactively address any concerns. Beyond this, quality benefits planning includes the exploration of asset development and additional funding streams, such as Plan to Achieve Self-Support (PASS), which can support the employment process. A brief overview of each of the key benefits and asset development programs is included in Appendix A.

Stage 2: Others to be Interviewed & Discovery Activities

Stage 2 includes interviewing the other people identified during the Stage 1 conversations and scheduling and completing DPG activities and observations. The basic Stage 2 steps include:

1. **Interview other people** who know the employment seeker well. This may include parents, siblings, teachers (if a student or recent student), neighbors, and support providers. Ask especially about the individual's interests, support needs, successful support strategies, skills and performance in various activities. *Look again for themes in the person's life.*
2. From information gathered so far, **identify several activities** the employment seeker participates in successfully. Do those activities with the person and observe interest, performance, demonstrated skills, connections, etc.
3. **Identify activities outside the home** that are familiar to the person. Accompany the person to these places and activities and observe skills, relationships, supports etc.
4. Based on the individual's interests and the themes you have identified so far, **identify unfamiliar places and activities** that may be in line with his interests. Go with him to these places and activities. Observe to gain additional information about support needs, reactions, attention to natural cues, interest etc. *Continue to identify specific skills and refine the themes.*

DPG Activities

Throughout DPG, the team is asked to engage in activities that test the information derived through interviews. These active observational opportunities can be used to develop ideas, test themes and interests, but most importantly to witness existing and emerging skills. While it is true that interests breed skills, skills are critical to getting and keeping jobs, so witnessing skills usage and acquisition is the crux of the activities. DPG activities may be identified through recognized interests, but the DPG activities themselves are used to identify existing skills, or those which can be cultivated through systematic training, workplace supports, and technology. This is also a good time to make a referral to the state Assistive Technology Project if relevant (<http://www.faast.org/>).

As the list above indicates, the initial DPG activities include observations of tasks the person currently does and enjoys. The next step is to schedule follow-up activities in the community derived from what is learned during the observations. These community DPG activities give the employment seeker the opportunity to both apply their skills in novel ways as well as to start building connections with other community members. Do not be surprised if it initially feels challenging to identify opportunities for follow-up activities in the community. Feeling this way is very common, but with practice, it becomes easier and more natural. Calling upon the support of other team members for brainstorming and connections can be invaluable, and should be a regular part of the process. One way or the other, it is critical not to shortchange or skip over these activities, because they serve as a key part of the foundation for the next stages of DPG. Also, team members should take pictures of the activities, so these can be used later to create a skills/tasks-based digital resume.

Spotlight on Florida RRTE: Discovery Activities Example

Marc* and his mother contacted the employment agency for services several years after he graduated from high school. Since his transition from school, Marc stayed at home, reading books and playing games on the computer. Information gathered during Stage 1 indicated that Marc had strong computer skills, including researching topics of interest to him, and playing a variety of computer games. His mother also reported that Marc enjoyed helping a neighbor with yard work a few years ago and that he loved working on cars with his grandfather. She said that when Marc was in high school, his favorite work experience was working in a hospital medical lab and that he had strong interests in alternative healthcare. Marc's collection of books on a variety of medical issues gave further evidence of this interest.

The team scheduled a few initial observations based on Marc's current interests and activities. First, they observed Marc on the computer, where he showed them how he researched different medical conditions. Marc navigated the computer effectively, including using the mouse, launching the Internet browser, typing, "type 1 diabetes" into the navigation bar, and downloading and reviewing the results.

Next they scheduled an opportunity to do some basic lawn care with a neighbor. Marc assisted the neighbor in digging up an old tree root, cutting the grass, and planting a few flowerbeds. Marc was attentive as the neighbor gave instructions and was able to complete the tasks, including: using the shovel to dig around the tree root; turning the lawnmower on; mowing in (mostly) even rows throughout the yard; stopping the mower to remove a large tree branch and then restarting it and resuming mowing; using the hoe to turn over the dirt for the flower beds; digging evenly spaced holes for the flowers; and placing the flowers in the holes and packing them with dirt.

Both of these activities gave evidence to the fact that Marc not only had interests related to the computer, medical research, and agriculture, but that he also had skills in each of these areas. As a result, the team decided to schedule follow-up activities in the community that included:

- ✓ Entering and filing specimens at a local dermatology lab
- ✓ Filing books and materials by content area at a local medical library
- ✓ Planting flower-beds and providing basic lawn services with a local landscaping company

Marc excelled at all of these activities. The experience at the medical lab was particularly powerful, as he learned how to operate numerous machines related to freezing, staining, and preparing medical specimens for evaluation. Throughout the activities, the employment staff documented the specific tasks Marc performed as well as took pictures to include in a visual portfolio. Completing these

activities verified Marc's interests. Equally (or even more) importantly, however, it gave the employment staff concrete and specific information about Marc's skills and the types of working environments that were the best fit for him. This is the very information most necessary for quality job development and exactly what is so often lacking when job development moves forward on the basis of one or two conversations alone.

**Name and other identifiers have been changed*

Stage 3: Vocational Themes, Initial Informational Interviews, & Vocational Profile

During Stage 3, the team identifies and verifies vocational themes, schedules informational interviews at community businesses, and completes the vocational profile. Stage 3 steps include:

1. **Identify at least three emerging Vocational Themes.** Themes are broad umbrella categories that represent an accumulation of many jobs, environments, skills/task sets, and interests. Themes are not job descriptions. Someone who helps their parents grow flowers in the family garden demonstrates that they know how to water the flowers, how to prune back dead leaves, and how to hoe weeds might, although additional Discovery is warranted, have an emerging Agricultural Theme. This is not a flower or a plant theme; that would be far too narrow. The same skills used in flower gardening are used across many types of agriculture (and within other themes too). The flower garden, after all, is likely the only place the opportunity to learn and perform these tasks has occurred. The skills they have (watering, weeding, trimming), however, are relevant in many work environments and should not be dismissed.
2. **Go to some places of employment** with the person related to the identified themes. Make an appointment with a manager and conduct an **informational interview**. In addition to conducting the interview, ask for a tour (following the interview) and observe the kinds of jobs people do at the business. Look for the jobs that are out of view and/or are unexpected. Look for inefficiencies and customer service needs; CE is based on satisfying unmet needs, so this information will be important later during job development or when formulating a business idea. Look for clues about the culture of the work place and whether this person might fit into it. Complete several of these interviews. (Note: Informational interviews are covered in detail in the Job Development chapter. Note that when using Info Interviews during DPG, it is made clear to the employer that no job is being sought, simply career planning information and advice from the owner/manager. During job development the focus of the interviews changes to acquiring employment).
3. **Return to the individual's home** if needed, to collect any additional information needed, have informal conversation and make more observations.
4. **Review** files, memorabilia and records of past and current activities and services.
5. **Review the notes** taken throughout DPG and add to them as needed to ensure they are thorough and descriptive.
6. **Write the draft vocational profile** using the information gathered during DPG. Identify the person's ideal conditions for employment including skills, interests, culture, environmental considerations, preferred or required days and hours for work, supports needed, equipment or

adaptations that may be needed and any other important considerations. Reference the three themes and the list of 60 jobs where people with those interest work.

7. **Review** the draft vocational profile with the employment seeker, family, and others involved on the DPG team.

Vocational Themes

The first step in Stage 3 is to identify at least 3 emerging vocational themes. The identification of these overarching themes serves several purposes. First, they force team members and job seekers to look beyond the limits of job descriptions and incorporate different aspects of the job seeker's skills, interests, and experiences. Second, they foster creativity because investigating themes takes job developers and other team members far beyond the confines of the more typical searches for "open" jobs. Finally, searching out the businesses where others share similar themes forces them to get to know their communities more intimately- beyond the Want Ads, the same ten businesses they have called on multiple times in the past, and beyond the typical entry-level retail and service jobs so stereotypical of disability employment.

Most importantly, the exploration of themes forces reframing of the job development approach. For instance, someone with an interest commonly defined as "cleaning" would almost always find himself or herself in some janitorial position. But, cleaning is actually a form of job description; therefore, it is not allowed in this process since it is too direct and too narrow. Reframing as the theme of "cleanliness" opens up many more job and task opportunities. For instance, a heart surgeon is concerned with cleanliness, as is a chemist, or a hotrod painter, or a pastry chef. Visiting the businesses where these people work reveals a host of tasks the person may be interested in learning, and they will be around others who share their vocational themes, fostering the likelihood that these others will connect with them personally and teach them additional skills and tasks. After all, human beings commonly are attracted to others with like interests and we share our knowledge with others more freely in these circumstances (Griffin & Hammis, 2011).

Example: Translating Interests to Themes

<u>Interest</u>		<u>Theme</u>
Dogs	➔	Animals
Trucks	➔	Transportation
Airplanes	➔	Aviation
Tattoos	➔	Alternative Lifestyle/Art

In rural communities, finding the themes has been essential to opening up the hidden commerce found on long country roads and in the garages of peaceful small town neighborhoods. Briefly exploring an “aviation” theme on one short road in a community of less than 1,000 people revealed a psychologist who provides counseling to people fearful of flying; a neighbor who handles baggage at the municipal airport in the larger town 30 miles away; and a frequent business traveler with over a million frequent flier miles. Connections through these people may well provide the clues needed to develop a job or a small business. If nothing else, a personal connection has the potential for evolving.

As the old adage goes, there is both an art and a science to divining vocational themes. Do not despair if they are not immediately apparent on first review of the information. More concerning might be if they are too easily evident or require no thought at all. Identifying the vocational themes requires the team to broaden their thinking and to incorporate information coming from other areas of the job seeker’s life than the employment arena alone. The intention is to challenge traditional thinking and often requires throwing out numerous ideas, talking them through, and ultimately refining them to settle on the three that appear most reflective of the person. For this reason, developing the vocational themes is best done as a team approach. GHA/CSC created a *Developing Vocational Themes Workbook* designed specifically to support teams through this process. You can find the *Developing Vocational Themes Workbook* at the Florida RRTE blog: http://griffinhammis.typepad.com/florida_rural_routes_to_e/.

Because all people have complex lives and are adaptable to varied situations, it is recommended that at least three Vocational Themes be identified before moving into job development (or small business creation). Why three? First, because one theme is never enough to anchor job development efforts and often represents the most obvious of ideas. Two themes still means there’s only one hardy theme. Three seems to work well, and gives vocational teams the diversity and depth-of-thought to move beyond stereotypical employment.

Three themes also allows for mixing and matching. So, taking the agricultural theme and combining it with a mathematical theme replete with such skills as: being able to calculate a ball player’s batting average; being able to add numbers on a desk calculator; and being able to read digital and analog scales may yield some interesting businesses to explore. Any business engaged in agriculture deals with mathematics on some level. They are buying and selling, they are weighing, they are bagging, they are projecting, they are taking measured samples, they are selling by the dozen, the gross or the hundredweight, etc. The point is that until these companies are explored the actual existing or potentially created jobs are unknown. Perhaps there are opportunities bagging and weighing seeds at the local plant nursery or measuring out how much fertilizer is mixed with water in a 500-gallon tank on a local farm.

During this stage of DPG, the team works together to identify three “emerging” themes based on the information gathered during the home visit, interviews, and Discovery activities. By this point the team

has gathered enough information to hypothesize possible themes. The next step is to schedule informational interviews, or half-day (sometimes longer) work experiences or paid internships, to verify each theme before moving forward.

Informational Interviews

Informational interviewing is a great way to develop rural work experiences, build a job placement network, discover new kinds of jobs, connect with employers, and build the database to rely on for employment ideas when beginning a job search with someone. Informational interviews are also, of course, vital for refining emerging Vocational Themes during the Discovering Personal Genius (DPG) process, and critical for gaining insight into the motivations and experiences of others with similar themes to the employment seeker being served.

In the Customized Employment process, Informational Interviews are generally used in two distinct situations:

1. During Discovery: *Getting to know* the owner or manager and having a discussion about them. This is not a job development meeting; it's the opportunity to learn more about the work people with similar Vocational Themes do in the local community and to ask for "advice" for an individual's career plan from the experienced business owner or manager.
2. During Job Development: Making clear that the employment seeker appears to match the core work and culture of the business, emphasizing the possibility of creating or restructuring tasks that bring greater efficiency and quality to the company and its customers.

Getting an appointment for an informational interview during Discovery is usually easier than setting up a job development meeting. GHA/CSC recommends using a Community Action Team (CAT), Active Employer Council (AEC) or even the local Business Leadership Network (BLN) to "warm up" the business' manager or owner (*see the section on Community Action Teams*). Introduce the employment seeker to whatever business roundtable group your agency utilizes and ask the members to assist with connections to business people in their supply and customer chains who have Vocational Themes similar to that employment seeker. Sometimes less effective, but just as legitimate, is a casual conversation with a prospective employer at the monthly Chamber of Commerce "Business After Hours" social or at a service club meeting (e.g. Kiwanis, Rotary, Lions, et al.) that prompts a probe such as, "I've never seen your operation before, would you mind if I called you to set up a time for a chat and maybe a brief tour?" Most people love to talk about their business and since you are not pressing them, setting up a phone call is considered low-risk. Make sure to follow-up soon, before the conversation is forgotten, and to illustrate commitment.

Generally a request for a twenty to thirty minute discussion works well because it signals respect for the person's time, and it indicates that you are busy as well. Historically, twenty minutes generally turns into sixty minutes once the discussion begins. As is the case with using Smooth Listening in Discovery, its impact is substantial during Info Interviews. During the Discovery phase, remember that developing jobs during the Info Interviews is not the point; gathering information that refines Vocational Themes, exposing employment seekers to an array of jobs and work settings, fostering prospective work experience options, and building the database of supply chains and local businesses is the purpose.

Getting a tour is secondary to this first Informational Interview. During Discovery we seek to learn from the business owner's experience. Ask for a tour and that's all you are likely to get. Instead, when setting up the interview, ask specifically for twenty minutes of "seat time" to sit and discuss the owner's career and to get "advice" from the person by asking: "if you were starting out fresh, what steps would you recommend for building a career in this field?" Explain that this information will assist in developing a career plan for the individual with a disability. Make certain you and the job seeker have rehearsed asking a few questions, but make the interview about the owner or manager; show them they are assisting. Business people tell us they want to help, but short of hiring, they do not always know how. Reinforce that this interview (and subsequent tour) helps refine the career plan. This visit is not for job development. However, should a likely match become obvious after Discovery, a return visit may be considered.

On-site, the employment seeker and the employment specialist are seeking information about the owner or manager first and foremost. Again, during Discovery the process of refining Vocational Themes and matching related skills, tasks and conditions of employment to real work settings is the reason for this research. The individual interviewed should be the owner or upper level manager because the business most likely reflects their themes, skills and conditions of employment. Interviewing the manager of Human Resources is not the aim, and it signals the likelihood the company is too large and bureaucratic for customizing work.

The best method for conducting an interview, whether during Discovery or job development is to make certain the meeting is structured around a discussion with the owner/manager; that seat time in a quiet place in the business precedes any tour, and that for the Discovery period, information and advice is sought on the career plan. During job development, however, the point of the interview is discussing the possibility of a job match.

Throughout the process, find answers whenever possible through conversational exchange rather than a checklist of questions. Discovery is not job development; do not press for a job. That comes later in the relationship. For now, the interview and tour are answering questions about the varying tasks and duties

people perform, the values and culture of the company, and needs the business has that the employment seeker can address.

While a more in-depth tour and job analysis occurs during the job development phase, it is essential to pay attention during initial Informational Interviews and tours. The tour provides an opportunity to witness, for instance, the level of natural support that may be available to someone with a disability. Keen observation reveals whether co-workers and supervisors help each other out during a typical day; it reveals who does the training and how an employment specialist might structure the initiation period so that the employer takes significant responsibility for supervision and training right from the start; it reveals what is valued on the worksite, such as muscle, brains, humor, attendance, speed, quality or other worker traits. These are important considerations, of course, when designing a job match that minimizes on-site training and consultation. (*See the section on Unmet Employer Needs for more information*).

The Informational Interviewing process, as well, reveals opportunities or red flags if the place of employment does not provide a good working environment. Some standard questions for an Informational Interview, again, asked in a conversational and not an interrogative tone, include:

1. Where do you find or recruit employees? (This is asked in case you now need to refer to the Workforce system if they do all the hiring searches for this particular employer; to identify your competition; and to create an opportunity to discuss the service you provide).
2. How are people trained in their jobs? (This gives information about natural training means and methods that can be sculpted into a job match and training plan, especially one that recognizes that in most cases business already trains its employees and that the support you offer is customizing their training, not replacing it).
3. What are the prerequisites for working here? (This points out the various qualifications, certifications, etc., that might be needed).
4. How or where do your employees gain the experience required to work here? (Another question that gets at qualifications and that seeks the advice of the “expert.” This also gives the job developer a list of other similar companies).
5. What personal characteristics do you look for in employees? (This gives insight into the kind of candidate the employer seeks; provides information on what to highlight in a resume or interview; and gives a glimpse inside the culture of the company regarding the most valued skills and attributes).

6. When employees leave, what other industries or businesses do they go to? (This starts getting at issues of staff turnover, which might be an indicator of a great place to work in the case where no one leaves, to an indication of poor management in the case where there is high turnover. It also provides the employment seeker and job developer with information on related industries and possible opportunities for someone interested in similar work).
7. What are the pay and benefit rates?
8. What are the work hours? Is there shift work? Does the company allow for flextime or other job accommodations? (This gives insight into the flexibility of management and the company's policies on work hours and expected work effort).
9. What impact is technology having on the industry? (This is a common concern for most businesses today and provides an opportunity for using Resource Ownership strategies to propose a job for someone who can use or bring with them a piece of essential technology that can be purchased through a Social Security PASS Plan or through Vocational Rehabilitation).
10. What are the current forces for change in this industry? (This question often leads to a lively discussion of how the market is changing, how personnel preparation and training is evolving, and how the competitive market is adapting).

All these questions and their answers breed add-on questions and discussion points that provide opportunities to solve labor problems or to innovate in the face of emerging trends in hiring. Informational Interviews are a low-tech, high-touch option that provides insight into the inner workings of business. Knowing what goes on in a company gives the employment seeker and employment specialist added advantage when creating employment or responding to an employer need.

If possible, it is highly beneficial for the job seeker to have an opportunity to try some of the different tasks at the company as well. This typically takes a bit more conversation and planning on the front end than simply asking for an informational interview. Because these short work-experiences give the job seeker a "hands-on" opportunity to try some of the tasks rather than solely observing or hearing about them, they often yield richer information than an interview alone. Leveraging the social capital of the CAT or AEC members tends to be one of the best ways to facilitate this type of activity with a local business.

It is not uncommon for Employment Specialists to report challenges when they first begin trying to schedule informational interviews, and it may be helpful for them to try some "mock" interviews first. GHA/CSC's "Strategies for Scheduling Mock Informational Interviews" can be used to guide the ES

through this process and is available at the Florida RRTE blog:
http://griffinhammis.typepad.com/florida_rural_routes_to_e/.

Spotlight on Florida RRTE: Informational Interview Example

Miranda connected with the Florida RRTE project several years after graduating from high school. During that time, she moved into a residential placement and participated in the majority of the group activities offered there and ultimately met with the employment services team to discuss finding a job.

Although Miranda lived onsite for several years, the employment specialists knew her only in that group context. They began DPG to learn more about her own unique interests, skills, and experiences. During the initial interview and home visit (to Miranda's room), Miranda identified that she would like to work with animals. The employment specialist also observed that her room was extremely neat and organized. Interviews with others confirmed that Miranda was very attached to the pets she had while she was growing up and that she had been responsible for much of their care- including feeding, walking, and bathing. Additionally, her grandmother stated that Miranda "was a whiz at organizing" and had always made sure their shelves of books and games were orderly at all times.

To learn more about Miranda's skills related to these interests, the employment specialist set-up several Discovery activities. First, he connected Miranda with a local pet sitter he knew through the agency's Board of Directors. Miranda spent several hours with the pet sitter, walking and feeding the dogs, poop-scooping after them on the walks, and making sure all was in order before leaving the customers house. She performed all of these tasks comfortably - even the poop-scooping - and reported that she enjoyed all of her time with the animals.

Additionally, the employment specialist scheduled a Discovery activity in the office at a local church, where Miranda stuffed envelopes and bulletins for the upcoming Sunday service and assisted with setting up the sanctuary, making sure every pew had Bibles, pencils, etc., and ensuring that all of the pews were clean and orderly. Miranda also excelled at these tasks, requiring little instruction or support to perform them correctly.

Based on this information, the employment specialist and team members identified animals and organization as two potential emerging themes. However, they agreed that informational interviews in more locations were necessary before these themes could be confirmed.

For the animal theme, the employment specialist scheduled informational interviews with two local businesses: a small pet-grooming salon and a local horse farm. During the interviews, Miranda and the employment specialist met with the business owners and learned more about the owners and the businesses, how they got started in the field, and the key skills/qualities they looked for in their

employees. Additionally, Miranda had the opportunity to try several tasks. At the pet-grooming salon, she bathed several dogs. Despite getting soaked from head to foot, she smiled the entire time and said that she “loved” doing it. At the horse farm, she participated in a variety of tasks, from grooming and feeding the horses, to bucking bales, to cleaning stalls. She willingly joined in all of these activities and reported that she would be happy to work there. Based on these experiences, as well as the information gathered earlier in the Discovery process, the team confirmed “animals” as one of Miranda’s theme.

For the organization theme, Miranda and the employment specialist conducted informational interviews at the local Chamber of Commerce, where she sorted community donations by type and also filed the papers documenting these donations. The employment specialist reported that Miranda was extremely efficient when sorting the community donations and independently determined how to sort the items by group. She required more systematic instruction to learn the alphabetical filing system. The employment specialist reported that he did believe that Miranda could learn this system over time but that she stated she did not enjoy this task as much as she enjoyed the sorting task. Based on this experience, the team determined that additional informational interviewing related to organizing would be helpful to verify or refine this theme, and the employment specialist scheduled a meeting with a local organizer to learn more about that business.

Vocational Profile

After completing the informational interviews and verifying the vocational themes, the next step is to complete the Vocational Profile. The Vocational Profile synthesizes all of the information gathered to this point and summarizes key details related to:

1. **Description of key employment-related characteristics discovered:** Highlights critical personal preferences, characteristics, skills, and contributions, including interests/talents; skills and tasks observed; best learning mode; places/situations to avoid; personal resources (benefits, family support, savings, transportation, etc.); most endearing qualities; and exploitable skills.
2. **Ideal Conditions of Employment:** Involves identifying *not the ideal job* but rather *the conditions that need to be met regardless* of what that job might be, e.g.: only work 30 hours/week, cannot work past 6:00 pm due to family issues, indoor work in a quiet location, etc. Environmental factors, location and scheduling considerations, and field and/or task considerations may all be included in the ideal conditions. The key purpose of listing the ideal conditions is to detail the conditions that the job should meet- not to identify what the job will be!
3. **“Off the job support” needed and who will provide:** Includes consideration of supports needed outside of work but that are key to employment success, e.g., supports needed with getting dressed/ready for work; medication/health management; scheduling appointments outside

of work hours, etc. Each off the job support needed is listed on the profile along with the name of person who will be responsible for ensuring it is met.

4. **Social considerations:** Identifies how the person will stay in contact with friends and who will be responsible for assisting if supports are needed with this. Employment changes the daily schedule for all of us. Job-seekers who previously attended day programs typically had ample opportunities for socializing with friends during the day. Targeted planning to make sure they continue to have opportunities and access to see friends around the new work schedule is often critical to success.
5. **Transportation:** Identifies how the person will get to and from work. A job that someone cannot get to does not fit the ideal conditions of employment, so guaranteeing that all possible jobs fit within the transportation options is non-negotiable.
6. **Ideal work schedule:** Identifies the best times of day/week for employment. Considerations of off the job support and transportation may be factors, as well as personal considerations identified above (i.e., if the job-seeker takes medication at night that makes them sleep until 8am, work ideally would not begin before 9am).

The Vocational Profile, which is the product of a thoroughly completed Discovery staging Record (DSR), ends with a descriptive paragraph or two highlighting the key points learned during Discovery that led to the identification and verification of the Vocational Themes. This paragraph includes information related to the job-seeker's skills, tasks, and potential contributions to the workplace. Most of the information summarized in the Vocational Profile can be found in the previously completed sections of the DSR. However, the Vocational Profile is designed to be a stand-alone statement shared with team members as a tool that hits the high-points and synthesizes the key employment-related information discovered. Team members may then use the Vocational Profile as the launching point for completing the Lists of 20 (during Discovery many entries to the Lists are developed along the way) and beginning the transition to job development.

Stage 4: Job/Business Development Plan

Lists of 20

The first step of Stage 4 is to identify the Lists of 20. Although creating the Lists is relatively straightforward, it is not always easy. Developing the Lists of 20 often requires a combination of brainstorming and basic research and tends to work best when done in a group. The Lists are populated as the Discovery unfurls since many companies are identified early on. In other words, don't wait until Discovery is done to begin the Lists; they are an on-going process.

The instructions for developing the Lists of 20 are simple:

1. List each of the three vocational themes identified/verified during Discovery, and
2. For each theme, identify 20 specific community businesses where other people with that vocational theme work. No more than 2 of the same type of business should be listed, so for instance, only 2 banks, or machine shops, or goat farms should be on any one list.

In other words, list 20 specific places of employment in the community, accessible to the person, where people with similar skills and interests work. There is nothing magical about the number 20, but 5 or 10 is just too easy, and creativity in employment, along with complexity, comes after the obvious employers are listed.

While the directive for developing the Lists of 20 is clear, teams quickly encounter challenges to its implementation. Employment Specialists may be working in communities with which they are not familiar and therefore are not able to identify a significant number of businesses related to a specific vocational theme. Additionally, many believe that since rural communities by nature are smaller than urban communities, there simply are not enough businesses available to fill the List of 20. Interestingly, however, identifying the List of 20 has proven to be the solution to finding the wide variety of businesses in existence in rural communities, rather than a barrier to moving forward with job development.

The key to developing the Lists of 20 then becomes less one of losing time debating whether a community has 60 businesses and more one of ensuring that people rich in social capital who know the community well are present to provide input and guidance. (For more information on this, see the section on Community Action Teams). Additionally, it is amazing what a little elbow grease and basic research can expose. A few Internet searches and follow-up calls to the previous initial informational interview sites often reveal a host of possibilities that would otherwise be overlooked. The fact that the Lists of 20 may not come easily or immediately does not provide a rationale for abandoning them. Taking time to consider, research, and brainstorm is a critical part of the process and one of the only strategies for preventing the team from taking that otherwise inevitable leap to pursuing the first job that comes to mind, regardless of whether it is or is not a good fit for the person.

When developing the Lists of 20, keep the following guidelines in mind:

1. **CE relies on negotiated job tasks that mutually benefit the employee and the employer.** By approaching specific employers who have task needs matching the job seeker's talents, a match is more easily determined. This can happen in companies of any size, so beware the temptation to assume that a small owner-operated business will not have needs or the capacity to hire.

2. **Understand that employers are always hiring!** They are hiring people who fit their company and who can generate their paychecks through profits. Again, this is true for companies of any size, from those that employ 1 - 4 people on up to Fortune 500 companies. It's not the size of the company that dictates the employment possibilities, but the opportunity to grow and generate revenue.
3. **If filling out applications and going through interviews is anything more than a formality to make Human Resources happy, then it's not customized.** CE circumvents these traditional comparative processes that screen people with disabilities out. There is nothing inherently bad about these processes for people who can survive them; but many people with disabilities are immediately screened out. Again, CE is based on negotiation, not the traditional employment process.
4. **Stay away from retail.** In rural communities, this directive might be "**Stay away from Main Street**". In this economy, retail is tough. And, regardless, retail has been stripped of much of its complexity. Complexity in work tasks often means more stable work, an abundance of natural supports via co-workers and equipment or technology, and higher earnings potential. Of course, it also means more rigorous use of systematic instruction by Employment Specialists.
5. **Seek out small businesses.** There are only 38,500 businesses in the United States with more than 500 employees. There are approximately 33 million small businesses, with fewer than 20 employees, the majority of which have no Human Resources Department or even job descriptions. Fewer barriers to employment, means easier negotiations. Given the significant number of small businesses in rural communities, this means that there may actually be more opportunities for job development, not fewer!
6. **People come together over shared interests.** Therefore, having an opportunity to meet with a small business manager or owner who shares the interests of the job seeker make the negotiation easier. As noted of course, interests are not enough, there must also be the potential for learning the requisite skills of the job, but the presence of shared interests is the foundation of all human relationships. And, employment is as much a personal relationship as marriage.
7. **There are unlimited ways to make a living in the world;** therefore, thinking in terms of job descriptions and job openings is pointless. Most of us only knew the 5 or 6 job descriptions promoted by our Guidance Counselor: teacher, nurse, firefighter, police officer, and lawyer. For people with disabilities that list became: janitor, dishwasher, paper shredder, grocery bagger, and recycler. CE represents an unrestrained economic development approach to infinite job creation and restructuring. Negotiate with employers while highlighting skills that match their customers' needs instead of looking for stereotypical openings.

Informational Interviews

As the Lists of 20 are developed, the team prioritizes the listings and begins scheduling informational interviews. Once again, CSC recommends using your Community Action Team (CAT), Active Employer Council (AEC) or even your local Business Leadership Network (BLN) to "warm up" the business' manager or owner (*see the section on Community Action Teams for more information*).

During Stage 4, the Informational Interviews largely follow the same format as described previously for Stage 3, but the purpose differs. During Discovery, the primary purpose was to *get to know* the owner or

manager, to have a discussion about them, and to ask for “advice” for an individual’s career plan from the experienced business owner or manager. Since Stage 4 signals the start of job development, the purpose of the Informational Interview shifts to assessing the potential opportunities and then laying the foundation for job negotiation when appropriate. This involves using the informational interview as an opportunity to make clear that the employment seeker appears to match the core work and culture of the business, and to emphasize the possibility of creating or restructuring tasks that bring greater efficiency and quality to the company and its customers. Naturally, the employment specialist will only be laying this foundation in businesses that seem to be a match for the job seeker’s skills and ideal conditions for employment, and where his/her possible contributions to the business are apparent. If the workplace does not appear to be a match, the employment specialist can approach the interview as an opportunity to learn about the business and field as a whole as well as to seek the input and guidance of the business owner or manager.

Identifying Unmet Business Needs

If the workplace appears to be a match for the job-seeker’s skills and ideal conditions, the employment specialist uses the Informational Interview as a mechanism for identifying: unmet needs of employers; potential areas for performance or quality improvement; profitable customer service improvements; opportunities to introduce new technology or processes; the potential for new products or services through Resource Ownership or a Business Within a Business. During job development or even post-hiring job analysis, this assessment of unmet needs is critical to creating a unique and profitable job match of mutual benefit to employer and employee. Knowing and rehearsing what to look for during the interview is key. The following questions may help uncover some of these unmet needs and ultimately become the foundation for job negotiation.

Remember: *Smooth Listening & Observation are more effective than an interrogation.*

1. Are there production bottlenecks? In other words, is a worker waiting for a piece of equipment that’s being used by someone else? Are workers downstream waiting for workers upstream?
2. Does production need smoothing? For instance, does a worker have to stop in order to gather new supplies or parts?
3. Are steps out of alignment? For instance, is a worker performing core tasks, but repeatedly interrupted by episodic tasks? Does she halt assembly to greet arriving customers?
4. Are there bureaucratic delays? Does the employee need to stop to enter data or do paperwork that someone else or a machine could do more efficiently?
5. Are workers looking for items they need? For example, is the inventory room disorganized causing time loss while parts or inventory are located?
6. Is the work area safe and organized, free from clutter? Does the tool room need to be monitored and managed?
7. Are customers waiting to be served? Are they leaving dissatisfied?

8. Are there routine customer service issues?
9. Are there products or services currently unavailable that would compliment existing items or improve customer satisfaction?
10. Is there an opportunity for Resource Ownership or a Business Within a Business that would satisfy more customers, enhance production, or compliment the company?
11. What are the challenges and opportunities of the future from Competitors, Technology, and Changing Demographics?
12. What would this company add tomorrow if it could? What would the employer like to change?

Again, when first meeting a business owner or during a first informational interview, observation may be less intrusive than questioning. As the relationship warms up these questions and observation points will be less likely to cause employer disengagement and should help build an understanding of mutual benefit.

Remember, it is not possible to help develop a win-win employment outcome without understanding the needs of both the employer and the employee. Discovery provides the opportunity to explore and identify the needs and contributions of the employee; the informational interviews provide the employment specialist this same opportunity for the business. Jumping quickly into job negotiation without taking the time to truly learn about the business frequently results in sabotaging any opportunities that may exist; taking the time to observe and talk to the business owner allows the best job possibilities to emerge much more naturally.

Negotiating Employment

At the heart of rural Customized Employment is the mutually beneficial negotiation that identifies the match between an individual and a place of employment, highlighting the specific tasks the individual can perform that benefit the employer. In rural communities there are fewer large employers with “open” jobs and set job descriptions. Instead, there are countless small companies, most with informal Human Resources functions and formalities. But, the margin of error for hiring is much less in a small company, so identifying a person/business match is essential to job development, and the negotiation that creates new opportunities for both parties is essential.

Understanding the support strategies needed for employee stabilization and job retention is also another key ingredient in the negotiated job. Employment Specialists and new employees should enter into any negotiation with an “I win and the employer wins too” attitude. The negotiation process, of course, is less harrowing when a thorough job match is done prior to any placement. This minimizes the actual negotiation time, but still some details of the job are likely left unresolved even as the first day of work approaches.

Close attention must be paid to the use of natural supports, including transferring the direct training and supervision to the proper personnel. This means that the transition from job coaching may need negotiating, but the fact that the actual responsibility remains with the employer should not come as surprise to anyone in a worksite. One simple gesture that proves effective in setting the expectation that the employer is ultimately responsible for long-term stabilization and success is to use the phrase “your new employee” throughout the job development process. Such as, “should you hire Edward, as your new employee, he will need training in just how you want these tasks performed.” Subtly, the Employment Specialist sets the expectation that his/her role is temporary and transitional.

Commonly negotiated job development and worksite elements include:

- ✓ Creating a new job from tasks matched to the job seekers skills and experience;
- ✓ Generating a timeline of when additional tasks and skills will be taught and the methods for teaching those, perhaps including the brief return of a job coach to assist the natural trainer;
- ✓ Instruction on operating, caring for, and sharing of tools and equipment with co-workers;
- ✓ Resource Ownership details;
- ✓ Supervision style, frequency, and feedback methods;
- ✓ Productivity enhancements;
- ✓ Workplace set-up, templating and jiggling production processes;
- ✓ Equipment or technology modifications;
- ✓ Worksite accommodations including task prompts and accessibility;
- ✓ Personal Assistant Services on the job;
- ✓ Transportation scheduling, car-pooling, et al.

Since all employees need some level of customization, many of these workplace issues are commonly faced by employers and should be handled in as natural a means as possible. Transportation, for instance, is generally a personal responsibility, but self-organized car pools are common in rural companies where workers may drive varying days or weeks. A job developer, or new employee, may

need to negotiate with co-workers to share transit with a non-driving employee, or work hours may require a negotiated modification to accommodate local accessible transportation schedules.

Machine fixtures and templates are commonly employed throughout the manufacturing industry, but a truly unique adaptation may be required for some workers. Negotiating with the employer may be required. And the expense involved may lead to a further negotiation with the employer, the State Assistive Technology project, the Social Security Administration for a PASS, or with Vocational Rehabilitation for additional equipment modification support.

Using the most typical means and people in these circumstances stays true to the intent of Customized Employment, and engages the employer in the success of the worker. Asking for too much flexibility can overwhelm an employer though. Further, a position that is extraordinarily modified may stigmatize the new hire and is probably a sign that the job match is not very precise. Matching specific tasks and skills to the company's needs, and using experience and practical application of job analysis techniques ensures the proper match and an appropriate level of job modifications (Griffin, Hammis, Geary, 2007).

Regardless of one's negotiating skills, conflict will arise as the many points-of-view and competing interests and policies clash. Understanding that employment is a consumer right, and that proper job development methods are being used, should minimize problems over time. And while work-related issues are not unique to rural communities, the lack of competition between rehabilitation provider agencies, a paucity of up-to-date training opportunities for staff and administrators, and sometimes a lack of advocacy information for families and job seekers, inhibits change and slows progress seen in more urban, fast-paced communities. Sometimes.

Customized Employment Outcomes

Customized Employment opens the door to a wider variety of employment outcomes, including: negotiated jobs (described previously in this manual), resource ownership, and self-employment. This section provides a brief overview of both resource ownership and self-employment (see www.griffinhammis.com for more information on these topics).

Using Customized Strategies and an Economic Development Approach

Resource Ownership

Resource ownership is not a specifically rural technique, but it is a small business strategy, and is quite effective anywhere businesses are under-capitalized, which certainly describes many small-town enterprises. Resource Ownership is a mutually beneficial process of acquiring materials, equipment, or

skills that, when matched to a job seeker's preferred working conditions and customer needs, generates profits for the employer and wages for the employee. The average cost of a bachelor's degree from a state-supported college today is approximately \$50,000 and that degree is a commonly and culturally accepted symbol of exploitable resources. Employers reason that they can profit from a graduate's education so workers with degrees get hired and earn substantially more over a lifetime than those without degrees. In essence, the graduate gives the employer that degree, a \$50,000 resource, in trade for a job. The same occurs when a mechanic who owns a set of tools applies for a job at a garage. Without the tools, the mechanic is less employable and demands lower wages than a mechanic with tools and training certificates.

People with the most significant disabilities are not often recognized for their exploitable skills or task-competencies. Resource Ownership mitigates the effects of disability stigma by suggesting a shared risk between the worker and the employer (and perhaps the funding agency), and a partnering approach to job creation.

Resource Ownership Examples

1. Ken is in his late-twenties and is labeled with a developmental disability. He has worked in an entry-level position at a dog kennel for over 6 years. As a result of the 2 dog-proof treadmills Ken purchased, the kennel was able to attract business from veterinary clinics for post-surgical rehabilitative dog walking, as well as from customers with aging dogs that needed gentle exercising. The treadmills were purchased for about \$2,000 through a small grant, but Ken could have borrowed the money from the agency that serves him or from his family, or used a Plan for Achieving Self Support through the Social Security Administration. Adding the treadmills increased Ken's weekly pay by more than \$100.
2. Samantha, a single mom with a psychiatric disability, found a job as a Clerical Assistant in a rural business office. To increase her hours and pay, she used a PASS to purchase a new full-featured copier. This machine provided various copying features that increased the complexity of tasks assigned, increased her production speed, and reduced the cost per copy. Bringing her resource into the company boosted her income by over 25%. By using the PASS for the resource, Vocational Rehabilitation redirected their money to repair her car so she could drive to work every day. She continued to reduce her gasoline costs by using a Social Security Impairment Related Work Expense (IRWE) once the PASS ended. The same company has employed her for almost 20 years, earning full health care benefits and an employer-funded retirement. That original copy machine has been replaced several times by the company now, but it brought her recognition as a capable employee and secured her spot on the team.

Resource Ownership should be used sparingly and with great caution. It should be used always on behalf of the job seeker. Quality job development strategies must be employed regardless of the

situation, and a proper job analysis and match should guide the effort. Critically important is that in most instances, the equipment being purchased, while profiting the employer, functions as universal technology enabling the new employee to perform the tasks of the job effectively. Typically the individual retains ownership of the resource, and the business covers through its liability policy. Both employee and employer should sign all resource ownership agreements and include provisions re: ownership, use, liability coverage, contingency plans, etc.

Self-Employment

Numerous myths surround the topic of self-employment. The popular media portrays business ownership as a grand adventure, suited only to those with enough entrepreneurial spirit and personal fortitude to work 80 hour weeks, sweet-talk venture capitalists, engineer new software code, and generate profit and loss statements at will (Nelson, 2005). The reality is something altogether different however, and is perhaps best served by thinking of self-employment as creating one job at a time, for one person at a time (Griffin, et al, 2014).

The typical small business owner in the United States does not fit the archetypal “entrepreneurial personality” described above. In fact, most people who are self-employed simply know how to produce a product or deliver a service. They have skills more attuned to production than to marketing and financial analysis, and they generally work alone or with very small staffs, and they slowly learn business operations through exposure, or they rely on contractors to whom they outsource a good deal of their bookkeeping and legal chores.

The myths surrounding self-employment likely have a discouraging impact on individuals with significant disabilities seeking to open a company. The prejudices are reinforced by false pronouncements of business failures as high as 85% in the first five years, and by the assumption that people with serious health concerns will be overwhelmed by the constant crush of business demands that young entrepreneurs rarely survive. Because almost 80% of businesses succeed in the U.S., and last 8 years on average, self-employment is actually a better bet than wage employment (Schramm, 2010; Griffin, et al., 2014).

Opening a business is not an easy task, but when self-employment matches the ideal conditions of employment; when production of a product or service matches the tasks and skills a person enjoys and shows competency in; when we start with the person and not the market; and when the necessary

supports are practical, affordable, and adequate, business ownership is worthy of pursuit (Griffin, et al., 2014).

A few examples illustrate some recent successful business ventures that relied on Discovery to guide the match between the individual and the product; that relied upon a team of people, including family, to assure support and success; and that capitalized on the individual's skills and interests to refine the business model. Names, locations, and some details have been changed to protect confidentiality.

- 1. Glasses Fast!** Roger is a young man with a developmental and a physical disability who was labeled "unemployable" at an early age. His parents always considered work a prerequisite of citizenship and adulthood. As a young man he developed an interest in his father's optometry business. With the help of a Plan for Achieving Self Support (PASS) from the Social Security Administration (SSA), and guidance from his support team (i.e. family, rehabilitation professionals, etc.) he investigated the purchase of a lens-making machine. A business plan showcased how his business, inside his father's business, would benefit both companies and satisfy customers with an average turnaround time of one hour for new glasses. While the equipment was expensive at over \$30,000, the PASS made monthly payments possible. Being co-located inside the optometrist office also brought with it substantial natural support from his father, and mutual profit from increased customer satisfaction in their small, rural community. This business-within-a-business model works well even in non-family companies.
- 2. Mike's Woodworks.** Mike has the label of a significant intellectual disability and was also considered unemployable. Using the Discovering Personal Genius approach to assessment his skills at hammering nails became obvious to his team. A few wooden garden products were designed and his employment specialist worked closely with Mike to assemble these and add skills to his repertoire. Soon a fledgling business was established and a new location inside a local cabinet shop was negotiated. Rent payments also bought advice and assistance from the crew at the company, and new product ideas emerged. Mike's skills grew to include operating power saws and drills. For the past year he has maintained average monthly sales of \$700 and also has a part time wage job that supplements his income.

The Process of Self-Employment

Business ownership is not meant for everyone, but it remains a viable option for many people. Customized careers involve the match between personal choice and the information about ideal conditions of employment detailed through the Discovery process. As with supported employment, the idea remains that everyone is ready to work and that all of us need certain specific supports to succeed in our economic pursuits.

The reason why some businesses succeed and others fail often has to do with the processes used to design and establish the company. Again, Discovery should point to self-employment as an option. Too often, people are rushing to escape bad wage employment experiences, or staff and/or families have a weak idea (often due to fear of the community or the process of job development) characterized by the statement “I think he could do this.” In Supported Employment, for instance, the quality of the job match has long been known to make or break job retention and satisfaction. Matching a person, a business idea, and a market are vital elements of business development as well.

The *Individualized Business Design Process* chart identifies some crucial steps in the business development process. Due to the scope of this course, only some of the elements are discussed below, including a more specific analysis of the draft business planning process.

□

The Individualized Business Design Process

(Critical Elements, not always Sequential)



Referral to Vocational Rehabilitation and Workforce Innovation & Opportunity Act (WIOA) programs is recommended. VR Counselors and Workforce staff has meaningful roles to play in the support of start-ups because they can fund tools, equipment, and training, while offering their expertise on local resources. Florida Vocational Rehabilitation offers supports to customers interested in self-employment through the Certified Business and Technical Assistance Consultant (CBTAC) program. Customers pursuing self-employment may access the supports of a CBTAC to provide assistance with developing and researching business concepts and writing the business plan. More information is available at www.cbtac.org. Employment specialists interested in providing self-employment services may complete the CBTAC vendor application at www.rehabworks.org.

Skill training and business training, as mentioned, is available through VR and the WIOA systems, as well as through many Small Business Administration (SBA) programs. The SBA funds such programs as the Small Business Development Centers (SBDC), Women's Entrepreneurship programs, the Tribal Business Information Centers (TBIC), the Senior Corps of Retired Executives (SCORE), and business incubators that provide mentoring, production space, and office equipment to start-up enterprises at low cost, and numerous special projects.

Financial and Benefits analysis is essential when developing a business and there are several key factors that need to be accounted for by small business owners with disabilities who receive Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) benefits. SSI and SSDI have different policies regarding self-employment than are used for wage employment. Net earnings from self-employment generally affect Medicaid, Medicare, Section 8 HUD Housing, food stamps, and other support programs, and these impacts should be planned for. Preparing a small business benefits analysis, or examining how a small business will impact the business owner's benefits is a vital initial step in the process of developing a company.

Of course, SSI and SSDI can potentially be used for additional business start-up funding through a work incentive from the Social Security Administration called a Plan for Achieving Self Support (PASS). PASS does not work for every small business but it can provide substantial start-up funds for a business over an 18-month or longer period. Furthermore, self-employment allows for resource accumulation in the SSI and Medicaid systems through a work incentive called Property Essential to Self Support (PESS). This policy allows a small business owner with SSI and/or Medicaid to have unlimited cash funds in a business checking account and unlimited business resources and property. Such opportunities do not exist in wage employment. A single person receiving SSI is required to have less than \$2,000 in cash resources if employed in a wage job. PESS eliminates that resource limit and allows the individual to accumulate wealth in the business account that can be used later for personal and business purchases. Self-employment, using PESS, is one of the few avenues to escaping poverty for someone receiving Medicaid and SSI.

The creation of a small business is fluid and non-linear. Many individuals already know what they want to do and they know how to do it. Others need individualized and unique supports, perhaps a few work experiences to clarify their choices, and significant assistance in managing their finances and operations. All of these components can be anticipated and accommodated, given the flexibility and affordability of supports and the existence of a market for the proposed goods and services. All major rehabilitative systems today include self-employment as a fundable option. Tenacity and good planning are the critical ingredients in getting support for a business idea, and a good product or service will forever be the cornerstone of profitability.

Community Action Teams (CATs)

One emerging mechanism for enlisting the community, business, families, job seekers and professionals in employment prospecting is through the establishment of Community Action Teams or CATs. These are descended from the more common forms of Business Leadership Networks (BLNs) and Active Employer Councils (AECs) but typically are more broad based in membership and are less focused on employer education and more individually focused on assisting people in finding work that matches their vocational themes and conditions of employment.

The BLN movement can be traced to its prototype, the Active Employer Council (AEC). AECs were designed to combat the passive nature of the ubiquitous business advisory councils. The model described here is based on a pilot project developed in Colorado by Griffin and Hammis and has since been replicated in many communities (e.g. West Virginia, Minnesota, Ohio and Florida for instance). The original AEC was a partnership program funded through Vocational Rehabilitation, and adopted by the U.S. Dept. of Labor. Implementation of the project generated over fifty (50) successful VR closures of individuals with significant disabilities into employment in a rural Colorado community in a year's time. Federal funding replicating key components of the project in several communities in the region, generating an additional 200 jobs, soon reinforced this success.

The key to establishing a successful, sustainable CAT is staying focused on the most important outcome: employment. Membership is generally a few rehabilitation professionals, service consumers, family members, and people from the business community recruited to offer advice and insight into the economic workings of a community. Most advisory-type boards fail because they have ill-defined missions and/or passive or unchallenged members. Operating an effective CAT entails committing resources to the effort, focusing attention on an exacting mission, making the CAT accountable for measurable outcomes, and building the status of member employers and stakeholders through public and private recognition.

The basic duties of the CAT, include meeting one or two job seekers at the monthly meeting; discussing possible Discovery activities; using personal and professional connections to address transportation

issues; listening to and reviewing his/her career plan and digital portfolio; initiating job development efforts based on the vocational profile developed through Discovery. Once possible scenarios for job exploration are briefly outlined, the CAT member(s) with the best connections to the desired worksites are enlisted to introduce the job seeker to potential employers/businesses. As the professional networks of the job seekers, employment specialists, and board members expand, so do local career options.

In essence the CAT augments the efforts of school transition programs, rehabilitation agencies or other established venues. The CAT makes these all the stronger by leveraging social and economic capital informally for those choosing to access this resource. The most important functions of the CAT include making introductions of job seekers to local business owners, leveraging social and economic capital to help with job development, and growing a strong nucleus working team that knows its community thoroughly and that can guide job seekers and job developers alike. Monthly, high intensity meetings with discernable outcomes are a must for maintaining and growing a CAT. A brief manual on designing CATs is available at www.mntat.org, and information on rural development of CATs can be followed at the “Florida Rural Routes to Employment” blog at:

http://griffinhammis.typepad.com/florida_rural_routes_to_e/2011/08/welcome-to-the-florida-rural-routes-to-employment-blog.html

Conclusion

While rural communities face many unique challenges associated with geography, resources, and opportunity, they are also rich in personal connectivity (social capital), in small businesses that dot the landscape, and in the uncomplicated processes of daily life. In many ways, rural job development is easier than in urban communities. It is easy to find and connect with the decision makers in small towns: power is less concentrated and is more diffuse across the population; the abundance of small business provides a canvas for economic creativity; and the potential for leveraging social capital through families, schools, local officials, and neighbors derives from the public’s lack of anonymity.

To recap the critical elements of rural employment creation:

1. **Discovery is essential to identify the skills one has**, how one best learns new skills, and the tasks the person can do or learn that makes them valuable to an employer. By identifying vocational themes in people’s lives, opportunities are vast, compared to “thinking in job descriptions” that limits our creativity.
2. **Wages derive from profits, not pity.** There should be an economic development reason for hiring. A civic or personal motivation for the employer is fine, but not the motivation behind proper employment development.
3. **CE is based on negotiated job tasks that mutually benefit the employee and the employer.**

4. **Employers are always hiring.** They are hiring people who fit their company and who can generate their paychecks through profits.
5. **If filling out applications and going through interviews is anything more than a formality to satisfy Human Resources, then it's not customized.** CE circumvents these traditional comparative processes that screen people with disabilities out. There is nothing bad about these processes for people who can withstand them; but most people with disabilities are screened out.
6. **For each of the three vocational themes, construct a non-duplicative list of Twenty Places where the career makes sense.** List 20 specific, non-redundant, places of employment in the community, accessible to the person, where people with similar skills and interests work. There is nothing magical about the number 20, but 5 or 8 is too easy, and creativity in employment, along with complexity, comes long after the most obvious companies are listed. Constructing the List of 20 forces us to learn about the depth and width of the economic activity in even our most rural communities.
7. **Use Informational Interviews to get advice for the individual's career plan, and to plant the seeds of competence.** By asking for career advice, and a tour of the company, worksite tasks are revealed and if a match seems possible, job development can be introduced (otherwise, job development doesn't start until after Discovery is complete). The informational interviewing process allows a business owner or manager to meet a person with a disability who, if properly matched, shares common interests. Job development is easier, if there's a match, because both parties know each other and have connected on at least one level.
8. **Stay away from retail.** In this economy, retail is tough. Retail has also been stripped of much of its complexity. Complexity in work tasks often means being taught new skills by the employer, having more stable work and an abundance of natural supports via co-workers and equipment or technology, and gaining higher earnings potential. High turnover in these positions makes natural co-worker supports difficult to come by. Note that retail as part of broader business, say a car dealer who also has a repair shop, or a retail bakery that produces its own products, are not strictly a retail businesses; they offer a wealth of skill-building tasks for employees.
9. **Seek out small businesses.** There are only 38,500 businesses in the United States with more than 500 employees. There are over 37 million small businesses, many with fewer than 10 or 20 employees, the majority of which have no Human Resources Department or even job descriptions. Fewer barriers to employment lead to easier job creation.
10. **People connect over shared interests.** Having an opportunity to meet with a small business manager or owner who shares the interests and vocational themes of the job seeker makes the negotiation easier. As noted of course, interests are not enough, there must also be the potential for learning the requisite skills of the job, but the recognition of shared interests is the foundation of human relationships.
11. **There are unlimited ways to make a living in the world.** Most of us only know a few job descriptions related to any particular interest or theme. And when serving folks with few recognized skills and with multiple barriers to competitive employment, stereotypical jobs became the default: janitor, dishwasher, paper shredder, grocery bagger, and recycler. CE represents an unrestrained economic development approach to infinite job creation, restructuring, and small business ownership. People in rural communities buy the same goods and services as people in cities, just in lower volume. Negotiate with employers while highlighting skills that match their customers' needs instead of looking for stereotypical openings.

PART 2: The Florida Rural Routes to Employment Project – Assorted Tips, Guidelines, and Outcomes

Florida RRTE Lessons Learned: Strategies to Impact Employment

The unemployment rate for individuals with disabilities is approximately 80%. This unacceptably high rate indicates that a large segment of the potential labor pool is being overlooked and left out. Living in rural areas often increases the barriers to employment due to a perceived lack of: jobs, support staff, funding, knowledge of the best methods of supporting individuals with disabilities to become employed, and transportation.

The Florida RRTE Project, sponsored by the Florida Developmental Disabilities Council in partnership with the Center For Social Capital, the foundation arm of Griffin-Hammis, Associates is addressing these barriers enabling individuals with developmental disabilities to become contributing, working citizens. Community stakeholders in rural communities in Florida have received mentoring to develop and implement strategies that lead to an increase in employment opportunities for individuals with developmental disabilities living in rural communities. Provider and funding networks in these rural communities have received mentoring in customized employment approaches and Community Action Teams to leverage social and economic capital to support job development.

The project counties include:

Osceola, Lake, Suwannee, Hamilton, LaFayette, Madison, Walton, Santa Rosa, Hendry, Glades, Lee, Collier and Charlotte.

Project Participants include:

Building Blocks Ministry, Bishop Grady Villas, Eagle Medical Management, Vocational Rehabilitation Area East One, Goodwill Industries of Southwest Florida, East Seals (Southern Georgia and Northern Florida), ARC- Big Bend, Career Source, Department of Education (Suwannee, Milton), Little Consulting, Project 10, Foundation for the Developmentally Disabled

Project Partners included:

Self-advocates, family members, political leaders, spiritual leaders, business owners, citizens, Agency for Persons with Disabilities, Habitat for Humanity, Council on Aging, United Way, Kiwanis, University of South Florida, Central Florida Autism Institute, Chamber of Commerce, AmeriCorps, Good Samaritan Village, Community Church members, members of civic organizations.

Implementing Best Practices

One goal of the *Florida RRTE* is to increase the number of individuals with disabilities becoming working citizens. By ensuring access to employment services and supports that utilize best practices, Best practices can be replicated and brought to scale.

The curriculum used in the Florida RRTE project is the Certificate in Community Employment Training approved by the national Association of Community Rehabilitation Educators (ACRE), includes:

- Discovery, Vocational Themes and Customized Employment
- Task Analysis, Job Analysis and Systematic Instruction
- Natural Supports
- Customized Job Planning and Development
- Interest Based Negotiation for Community Employment
- Extended Employment Supports
- Social Security Work Incentives, PASS, and other braided funding strategies

With additional optional content on:

- Self Employment, Business Idea Development, Feasibility Testing
- Writing a Business Plan, Marketing and Sales
- Community Action Teams

The project is grounded by a collaborative approach across disability systems. The well-attended training sessions were open to all individuals interested in participating in the Training. Surveys were consistently rated at 100% satisfaction.

Participants who completed the 40 hours of didactic/classroom training, community assignments, fieldwork and passed post testing earned the ACRE Community Employment Certificate. Participants who also worked with a job seeker and completed Discovering Personal Genius (Discovery), the Discovery Staging Record (Profile), and passed the critique received a Center for Social Capital Discovery Certificate. The Florida Division of Vocational Rehabilitation has approved the ACRE and Center for Social Capital Certificates to denote provider competence to become a Florida Vocational Rehabilitation Vendor for Discovery.

Provider Perspective

“We have been doing [job development] backwards for so many years and have had to continually try to fix what we had not done well from the start...I told my supervisor I feel guilty being paid because the work is now so interesting and meaningful” (A.M., Florida RRTE Project participant)

“I have learned much about how to work with job seekers. Getting to know the person first makes all the difference.” (R.W., Florida RRTE Project participant)

Reported Employment Barriers from the Provider Perspective

- ✓ *Policy Conflicts across state level disability agencies*
- ✓ *Regulations are difficult to meet*
- ✓ *Inadequate funding to provide/continue employment services*
- ✓ *Lack of sufficient funding for long-term employment supports*
- ✓ *Funding regulations, policies, and service management are not consistent across disability agencies and result in confusion and frustration*
- ✓ *High staff turn-over rates*
- ✓ *Employment staff tend to feel excluded from other staff and this impacts staff team work*
- ✓ *Frequent Crisis Management*
- ✓ *Lack of training tracks for employment staff who do not have skills or experience and employment tracks to maintain skills for staff who are more skilled and experienced*
- ✓ *Difficulty recruiting, hiring and maintaining employment services staff*
- ✓ *Systems remaining in a disability model mindset and not looking beyond traditional systems for solutions or to support the work*
- ✓ *Staff do not know how to utilize natural supports as part of the solution for inadequate funding and to promote inclusion*
- ✓ *State and Federal Funding are not in sync with the utilization of Best Practices*
- ✓ *Vocational Readiness is embedded within systems*
- ✓ *System change is a complex process*
- ✓ *Mixed messages from stakeholders regarding employment as the first option*

There is need for provider expansion into Employment Services/Supports that utilize best practices and capacity building by increasing the number of providers in the state.

Throughout the project we fielded recurrent questions:

Employment Service Delivery Concerns	Possible Solutions
Family does not want individual to work.	Share that meaningful employment is one of the quality life goals that all adults

	<p>deserve the right to participate in. Having money, a valued role, being viewed as a contributor is important. Listen to family concerns and identify what will alleviate their fears. Involve the family in the planning and Discovery process. If family participation is encouraged they will know you respect their concerns. This will be the first step to building the trust needed to move forward.</p>
Individual does not want to work.	<p>It is important to find out what is the root of this decision and to assist the person with addressing their concerns (fear, loss of friends, lack of exposure to work). Discovery provides the methodology to focus on the person's strengths, interests and options. Informational Interview (s) can further ensure the individual has the information needed to make informed decisions regarding employment.</p>
The funding is inadequate to cover actual service costs.	<p>Blending and braiding dollars from multiple organizations that have the goal of increasing community employment for individuals with disabilities is critical. Develop partnerships with these funders (VR, CareerSource, Social Security Work Incentives, ITAs, IDAs); explore non-traditional potential funders using social capital such as churches, businesses, foundations, civic organizations, Unions, Tribal Funds; assess family/individual ability to contribute resources toward the employment outcome.</p> <p>Individual Training Account (ITA) – training funds from the Workforce System for those eligible.</p>

	Individual Developmental Accounts (IDA) – funds for those who are eligible to save toward a home, education or small business.
I am not confident in providing employment services.	Organizations must invest in staff training and skill development. It may also be of benefit to consult with organizations that are successfully utilizing best practices and obtaining quality outcomes. Forming a reading group to discuss articles, books, and other literature pertaining to person centered employment/best practices may additionally provide opportunities to enhance knowledge base
What is Discovery?	Discovery is the process of getting to know the job seeker, their interests, skills, support or accommodation needs, conditions for success and conditions to avoid.
What is Customized Employment (CE)?	CE is the process of individualizing and negotiating the employment relationship between a job seeker and an employer to meet the needs of both.
How is a job customized?	Job Carving – an existing job description is modified to contain some of the tasks but not all of them. Job Creation – creating a new job. Negotiating a Job – identifying job tasks from the workplace to create a job.
Why customize a job?	The benefits include: Work tasks that are being neglected may be completed more quickly and efficiently; Overburdened employees become more productive; Businesses become more profitable as a result of better flow and more efficient operations

What type of work is most suitable?	Discovery is the process of getting to know one's interest, skills, preferences, support or accommodation needs, and conditions for success and conditions to avoid. Customized Employment methods match who the person is to the needs of an employer
How to address fears of losing SS benefits and Medicaid.	Benefits Planning experts can help determine the impact of work on one's benefits. Work incentives are also available to individuals who receive SSA benefits (SSI, SSDI)
How to ensure safety.	Through the process of Discovery safety needs are identified, and during job negotiation such safety needs are addressed as conditions for success and conditions to avoid that are required to ensure the job is a good match
What if the job is lost?	During the provision of long term supports and follow up, issues are identified if present and addressed as they arise, but should the job be lost, just as with anyone who loses their job, the process of job development is the next step and will assess what can be learned from the job loss and this information will be incorporated into the new job search

Throughout the project we used feedback to improve training & technical assistance

<i>Project Participant Comments Regarding FL RRTE Performance Based Training</i>	<i>Project Participant Comments Regarding FL RRTE Training Curriculum</i>
"Concrete exercises, activities, role-plays and community based field work are very helpful."	"I knew nothing about self-employment before the training. Now I feel I have the skills to help someone start their own business"

"I have learned much more seeing the methods done than from webinars or just sitting in a room listening to a presenter."	"I have a better understanding of what our clients are capable of and how to think outside the box."
"Stories are an effective way to teach about the outcomes and methods."	"Dispelling myths and troubleshooting as a team, and follow along supports will help me work better."
"The case studies demonstrate the openness and creativity that is part of Discovery and Customized Employment."	"Glad to learn about Relationship and Community Mapping."
"Going into the community to learn and observe the methods is the most helpful way to learn."	"I have enjoyed learning how to assist job seekers with finding jobs that suit who they are."
"The energy, enthusiasm, and positive approach with demonstration are motivating."	"I have learned ways to think more creatively regarding job searches."
"Observing how to address business owners took my fear away."	"I benefitted from learning how to engage the family during the first home visit."
"This approach has made me want to learn more."	"Learned how important observation is and how to communicate the information without bias."
"I am excited about working with the job seeker [with the trainer's support] and completing the process from start to placement."	"The idea of social capital is so important. I do not know why I never saw this before."
"The real life examples are very meaningful to learning."	"I found the new approaches to employer engagement what I was lacking in being effective."
"I value the opportunity to work with a job seeker and support team under the guidance of [the trainer]."	"The process helped me realize that I need to become more involved with clients."
	"Best Practices is new information to me and it makes sense."
	"Staff are excited about working with clients who are tougher to place."
	"I am looking forward to starting the Community Action Teams."
	"I had not realized how important it is to

	consider both the job duties and work culture.”
	“I will start using job task analysis and systematic instruction.”
	“Developing Vocational Themes is a better approach.”
	“The visual resume is an impressive approach. I have not had success with paper resumes”

Florida Division of Vocational Rehabilitation Services Perspective

In rural areas employment opportunities are often created rather than filled. Vocational Rehabilitation (VR) Services has the diversity of funds to pay for career assessment, job development, and coaching, as well as, for tools, equipment, formal training, education and self-employment start up costs. In addition to VR funds, it is important to assist job seekers to access all available resources including Ticket to Work, CareerSource and Social Security Work Incentives and any other resources/assets that can be blended or braided to fund employment outcomes.

The Florida Division of Vocational Rehabilitation Services established a Discovery benchmark that enables certified providers to be paid for providing Discovery. The Griffin-Hammis/Center for Social Capital Florida RRTE Community Employment training curriculum has been approved by VR as a means to certify providers to provide Discovery services as a VR vendor. This approach was refined on several state milestone systems and has “start and stop points” with measures that align with:

- ✓ Assessment (Discovery)
- ✓ Job Development
- ✓ Worksite Support/Coaching
- ✓ Extended services and Career Management.

One Florida VR region became a development site. There was a distinct advantage of having Florida Vocational Rehabilitation Services as one of the Florida RRTE agencies.

Benefits include:

- ✓ Coordinating existing VR processes to include best practices
- ✓ Identifying existing policies that are consistent with best practices, e.g. Resource Ownership and the policy for purchasing tools and equipment

- ✓ Having a strong investment and buy in for system change and more effective means to quality outcomes
- ✓ Developing a macro team base to include providers, community leaders, one-stops and funders
- ✓ Aligning the project with state VR system change efforts

Overall Florida Rural Routes to Employment Project Data Summary

Providers who attended the training	58
Providers who obtained ACRE Community Employment Certificate	38
Individuals with ID/DD Employed	36
Job Placement Categories	Education (Support Services) - 2 Natural Resources (Plant, Animal Services) - 3 Hospitality and Tourism (Food Services, Lodging, Recreation) - 11 Business (Sales, Clerical Support) - 17 Beauty (Salon) - 1 Transportation (Sales and Service) - 1 Self Employment (Entertainment) - 1
Florida RRTE Project Products/Dissemination	4 National Webinars to 200 people each session (Free) 1 Employment Conference Florida RRTE Facebook Page Florida RRTE Blog APD Articles (2) Florida RRTE Project Replication Readings Manual
Additional Impact of Florida RRTE Project (numbers are not included in Florida RRTE Project Employment Data)	18 individuals with non ID/DD diagnoses became employed as result of project site staff using methodologies taught through the Florida RRTE Project

Florida RRTE: *Process Examples*

1. Discovering Personal Genius: Person-Centered and Strengths-Based

Anna

Anna has lived in the same Florida rural community all of her life. When we met her she was somewhat reluctant to engage but did state she wants to work at Wal-Mart. She has had a series of short-lived jobs in fast food and also indicated she would like working at McDonalds where she frequently eats. The individuals to form her support team were identified, and she agreed she wanted them to assist her in finding a job. After interviewing individuals who have known Anna, we found varying perspectives about her strengths, motivations, support needs, preferences and conditions for success among these informants. Because we feel urgency about assisting individuals to become employed, we had to determine what information was relevant, valid and what information was possibly a less balanced view of whom Anna is. To determine this we would need to spend time with Anna engaged in meaningful activities to “get to know her”. We soon realized, after developing a relationship of trust that Anna has numerous talents, skills, strong feelings of compassion for others, as well as consistently expresses a desire to work.

Discovery typically begins by spending time with the job seeker in their home, with their permission. Since Anna lives with her mother and sister, she ensured that they were also aware that we would be spending time with her at home. Anna’s organizational skills were a common thread observed. Her closet was organized by types of clothes, length of garments and neatly hung on hangers. Her shoes were also organized by type and the pairs placed side-by-side. Her bed was made with the spread smoothly covering the pillows and huge evenly on each side. All items were put away in containers, drawers, or on shelves. There was one framed item on her walls the certificate she was awarded for attending childbirth and parenting classes.

Additional planning was completed before we ended our visit. We discussed novel activities she has never done but would like to do, activities she enjoys that we could participate in, and we knew as we got to know Anna that we will identify other activities that will provide us with opportunities to find the answers regarding who Anna is. Anna has dual labels of Intellectual and Mental Health Disabilities, and is receiving treatment. We obtained her permission to collaborate with her therapist and other members of her mental health support team as well.

As we spent time with Anna we observed that she knows many people in this rural town. Building community connections to form partnerships as we develop strategies and plans to assist individuals to become employed is a critical aspect to our work. We were hopeful that these individuals would, with Anna’s permission, also be willing to support Anna’s vision for employment. Further Relationship

Mapping lead us to a maternal uncle, siblings, paternal grandmother, prior teachers, the bishop of the church she attends, speech therapist, and contacts at Wal-Mart.

Neighborhood mapping revealed a park, daycare, restaurant, convenience store, and a few abandoned buildings.

Her previous high school teacher is a champion for Anna and listed numerous strengths. She voiced that with the “right support” Anna can have a working life. Further discussion provided us with the details of conditions important for success, conditions to avoid, and some themes she has identified from teaching Anna. She also shared several stories demonstrating her kindness and compassion for others.

After completing Discovery activities and interviewing individuals who are involved in her life, we completed the Discovery Staging Record. The ideal times for Anna to work are 3:00 pm to 8:00 pm, the hours when she is most productive, taking into consideration the impact of her medications. She prefers not to work on Sundays due to family and church gatherings, but has no difficulty working other days of the week. Anna is a visual learner; the most effective learning methods include observation, modeling, verbal feedback, and lastly hands on cuing.

The best work environment is one that is positive and encouraging, with predictable job tasks, and a structured schedule with little variation, encouragement to express herself, positive verbal comments when a job is well done, and time to adjust to new people and tasks.

Conditions to avoid include: demanding and critical work culture, expectations of fast paced task completion, tasks and environments that require rapid processing of information, independent problem solving and decision making. Identified Vocational Themes: Retail (merchandise handling), Advocacy (personal care and support), Hospitality (lodging, housekeeping).

<i>Vocational Theme</i>	<i>Vocational Theme</i>	<i>Vocational Theme</i>
Merchandising/Retail	Advocacy: Personal Care-Support/Helping Professions	Hospitality
Examples from List of 20 Businesses where People with similar Themes work	Examples from List of 20 Businesses where People with similar Themes work	Examples from List of 20 Businesses where People with similar Themes work
<ul style="list-style-type: none"> • The Christian Book and Music Store • Joan’s Beauty Supply 	<ul style="list-style-type: none"> • Suwanee Healthcare (paid internship) • Thomas Funeral Home 	<ul style="list-style-type: none"> • Camp Weed • Spirit of Suwannee • Holiday Inn • The Deck

<ul style="list-style-type: none"> • Scott's Pharmacy • Colbert's Florist • Celebrations Cards and Gifts 	<ul style="list-style-type: none"> • Community Churches • Surrey Assisted Living 	<ul style="list-style-type: none"> • Sakura
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2. Paid Internship, Wage Job and Self-Employment

Rob

Rob's interest in cars, trucks, riding and push mowers, and tractors was apparent prior to him entering elementary school. Living on a farm with his parents was the perfect environment to have opportunities to participate with his dad in working on vehicles and farm equipment.

During Discovery his employment support team was able to observe him mowing, working with his dad on their truck, and backing-up a truck with a trailer attached. It was important for his parents to share that Rob does not drive on public roads.

His career interests fall within the overarching category of Transportation. One safety requirement of his parents is that he has support with reviewing safety rules prior to involvement with vehicles and equipment. Reminding Rob of how important it is to be cautious and how easily accidents can occur when not careful was the reassurance his parents needed to be comfortable with Rob working.

After observing Rob and his dad work on the family truck we realized we needed someone who works in transportation related jobs to help us understand the skill sets Rob has, what jobs those tasks are performed in and for Rob to have the opportunity to find out more about Transportation themed jobs.

We arranged an Informational Interview with a mechanic and owner of Grahams' Body Shop in his rural Florida community. Mr. Graham focused on Rob's skills, jobs that match those skills, and stressed how critical it is for Rob to have continued opportunities for "learning the trade" if Rob chooses to have such a career.

Rob and Mr. Graham felt comfortable with one another and bonded over their interest in vehicles. When the topic was broached of apprenticeship, so that Rob could spend paid time working under Mr. Graham's tutelage, they were both interested. Mr. Graham has had some difficulty keeping "good workers" in this rural community so this was a win-win for both. This arrangement creates a natural support for Rob, utilizes typical practices for how Mr. Graham wants his employees to perform tasks, and helps to ensure that Rob is not treated differently than other employees. These natural supports

encourage healthy assimilation of Rob into the work culture. As Rob completes this time limited paid apprenticeship, he and Mr. Graham have begun discussions around hiring.

During one of the Discovery activities, we observed Rob working with his parents during an auction. His parents are auctioneers. Rob assisted with carrying items that are being auctioned and also helped load purchased items. Small engines are frequently one of the items sold. We have begun to explore the feasibility of Rob repairing the small engines for resale through the auction or having a business within a business either at the body shop or a small engine repair business that is in this small rural community.

3. Resource Ownership and Economic Development

Miriam

Miriam's Vocational Themes include Culinary Arts and Natural Resources, specifically Food Processing and working with Animals. One of the businesses on the list of 20 places where individuals with similar themes work was a reserve for wild animals that have been injured. Their mission is to rehabilitate the animals to return to their natural habitat or if that is not possible to provide a home for them.

Customized Employment (CE) is an economic development model. We spend time with small business owners learning about their business, mission and needs thus enabling us to assist with finding solutions. Due to the day to day responsibilities of small business owners they may not have time to focus on how creative and innovative business practices can help their business become more efficient, effective and profitable.

CE Employment engagement does not include questions such as: "are you hiring", "do you have any vacancies" or the emotional plea of how they will be a better person if they hire someone with a disability. Instead the conversation includes asking such questions as:

- ✓ What are you most proud of regarding your business?
- ✓ What product or service would you like to provide that you are currently not providing?
- ✓ What resources are needed to provide these?
- ✓ What keeps your day from flowing effectively/smoothly?
- ✓ What keeps you awake at night regarding your business?

When we asked these questions of the owner of the wildlife rehabilitation center, we learned that three of the animal rehabilitators have to share the duty of chopping food for the animals during their 8-hour shift. As a result, their valuable time with the animals is limited and the cost of having a highly skilled animal rehabilitator chop fruit and vegetables is costly. Using funding to purchase a Hobart Cutter as a

resource that Miriam could bring to the business to perform job tasks would enable her to complete in 4 hours what it is taking the rehabilitators 8 hours to complete.

This approach is called Resource Ownership, a common business practice. Many mechanics are required to bring their own tools to perform their job, chefs frequently have to bring their own knives, and some jobs require a specific level of education, certificate, or degree.

4. Informational Interviews and Job Creation

Sandra

The Job Development Plan for Sandra included specific community businesses that have or would benefit from having a Receptionist or Information Clerk. Several of the Community Action Team (CAT) members identified business owners they could contact “to open the door” for the employment consultant to schedule an Informational Interview. One of the small business owners who was recommended had already identified that he needed to hire a receptionist and was ready to work out the details when we arrived. He interviewed Sandra and offered her the job “on the spot”. Because the owner is frequently tied up with day-to-day operations he wanted someone with an engaging personality and who sincerely cared about the customers. During Discovering Personal Genius we observed this contribution repeatedly in a variety of situations and with a variety of individuals and were able to market Sandra’s skills as being a great match to solve his hiring needs.

5. Matching the Job Seeker with the Business Culture is Just as Critical as Matching the Job Seeker to the Job Tasks

Cade

Cade has a desire to tell his story to others and to influence audiences to become the “best they can be” just as Cade feels he has done. The dilemma for this type of work is that Motivational Speakers can have a difficult time having enough speaking engagements to make a living wage. During Discovering Personal Genius (Discovery) we learned Cade’s contributions include: compassion for others, wanting to help others, a desire to teach. Basically Cade has a strong Advocacy theme.

His family and others are champions for Cade and shared numerous stories of how Cade has independently initiated conversations with others in an effort to “bring sunshine to their day.” In addition to Motivational Speaking, which Cade has had as a career goal for many years, Business Customer Service/Support was revealed as a good match.

When we shared Cade’s profile with the Community Action Team, one of the members mentioned that the Salon she uses was hiring for a position that includes the tasks of welcoming customers, informing

the stylist their customer has arrived, being available to obtain drinks, coffee, tea and snacks for customers until the stylist takes them back for their appointment, and answering the phone. During one of the follow up visits the employment consultant made with Cade and the owner after he had been employed for 3 months, the owner stated that the work environment has never been so positive and the customers “always ask about Cade if he is not at work when they come in.” Cade’s Advocacy for a good “salon experience” is highly valued by the owner, co-workers and customers.

An added value for Cade in this position is that the culture of the salon offers support for Cade regarding his motivational speaking goals. Over 65% of customers choose their stylist because they are good listeners and problem solvers, i.e. lay therapists. Research indicates that 84% of customers trust their hairdresser’s advice over the advice of their therapist. What a perfect work culture for someone who wants to help others become the “best they can be”!

6. Natural Supports as Effective Solutions

Randal

When a customized job was negotiated for Randal at a tire company, he was understandably upset when the transportation option we had worked out during Discovery “fell through”. The employment specialist and Randal returned to talk to the owner about the problem. Randal happened to see an acquaintance that was working at the business. As it turned out, the individual was a neighbor who lives a couple of streets over from Randal. The transportation solution was a quick fix! Randal walks to the neighbor’s home and rides with her to work. After he received his first check he was able to share costs by paying for half the round trip gas. Randal has a means to get to work and this benefits his neighbor/co-worker’s budget.

7. Think College – Post Secondary Adult Inclusive Education

Talia

When we first met Talia we were told of her interest in computer graphics. She had been the subject of a newspaper article about a “Stop Bullying Campaign” she created after experiencing what she describes as painful bullying from a high school peer. During the home visit we were impressed by the short video she had created using rudimentary computer tools.

One of her support team members has a business connection that is a graphic artist. His small business provides an array of Information Technology services including web design and videography. Using her social capital, an informational interview was scheduled with him. During our meeting he agreed to meet with Talia to critique her work and offer recommendations.

He noted that Talia is talented especially in the area of drawing. He suggested that she receive additional training in Graphic Arts for the type of career path her skills and interests are most suited for. Florida is fortunate to have adult inclusive post secondary education programs, which offer opportunities for individuals with disabilities to obtain continuing education. Talia's employment specialist located a community college that offers the recommended course.

An Informational Interview was arranged for Talia and her employment consultant to meet with the course professor. Talia now has another champion who will be important to her support team as Talia obtains the needed education/training to move closer to becoming an employed artist.

Outreach to Job Seekers and Families

Family Perspectives and Concerns: Advocating for Employment

There is a widening network of parents endorsing employment for their family member, but many families continue to have concerns regarding their son or daughter working. These concerns are often based on fears. The manner of parenting, specific concerns based on their individual son/daughter, personal values, degree of involvement and culture is specific to each family. Just as all individuals are not the same, all families are not the same, and thus it is important not to generalize. While emphasizing that families are unique, there are some common fears and issues. Understanding these concerns will help in addressing them and result in more effective advocacy for employment.

The process of developing trust begins with listening, respecting these very real fears, understanding family concerns and offering support in resolving or minimizing risk. Additionally, listening results in an opportunity to encourage and support the family as they assist their son/daughter in becoming more independent.

Common Concerns:

- ✓ Social attitudes and lack of acceptance for difference and diversity in the community
- ✓ Labeling and discounting son/daughter's strengths by others
- ✓ Lack of patience, understanding and support in the work place
- ✓ Rejection by others outside of segregated settings
- ✓ Teasing and bullying by others
- ✓ Having a job will put too much pressure on their family member to succeed
- ✓ Cruelty and discrimination
- ✓ Lack of oversight and fears of accidents and injury
- ✓ Son/daughter's inability to communicate if he/she is abused or exploited
- ✓ Finding jobs that match their son/daughter's skills and abilities
- ✓ Options available if son/daughter loses job
- ✓ Difficulty in developing healthy relationships in an employment setting

- ✓ Impact of work on son/daughter's disability benefits

As employment specialists, we assist families with addressing these concerns by encouraging their involvement in the employment process. When families feel their concerns are respected, a gathering point of common concern is reached allowing employment advocacy to begin.

Steps to Advocate for Employment:

1. Have an honest, open discussion regarding concerns, issues, fears
2. Support family members in understanding current employment best practices and how the person-centered process accommodates concerns and support needs
3. Share the success stories of others
4. Explain that your relationship with the family is one of partnership and collaboration
5. Establish regular times for information updates with families about concerns during the discovery and employment development processes
6. Connect the family with Benefits Navigators and Work Incentive experts (www.floridajobs.org)

When these steps are incorporated into your tool kit for working with families (and all team members), bonds of trust form suggesting you can effectively support their family member to have an inclusive life through employment.

Transportation Solutions

Lack of transportation significantly impacts access to employment. Rural communities are more impacted by the lack of options due to remoteness, low population, and lack of public and private transportation services. While transportation resources are crucial to a thriving community, it is important to prevent transportation from determining who works and who does not.

One aspect of the employment specialist's role in developing work options is identifying how the individual will get to and from work. For example, in some instances there are short-term transportation subsidies through Vocational Rehabilitation or Ride Sharing with co-workers. But the sole responsibility for finding the long-term transportation solution is not just the employment specialist's responsibility. In exploring and developing transportation options, it is important to involve others including:

- ✓ Family
- ✓ Friends
- ✓ Neighbors
- ✓ Roommates
- ✓ Residential staff
- ✓ Personal Care Attendants
- ✓ Service providers
- ✓ Other professionals who have had to address transportation issues
- ✓ Community Members of Civic Organizations
- ✓ Community Action Team (CAT) members
- ✓ Social Groups the job seeker is a member of
- ✓ Church members

There is no one right answer to the transportation dilemma. Using the step-by-step structure below during transportation planning for a specific individual helps move from challenge to solution as a variety of options are identified and explored.

1. Research all options by phone, Internet, discussions with others (e.g. a Google search for Ride Sharing or Accessible Transit in the area)
2. Begin planning for transportation as soon as you begin Discovering Personal Genius, i.e. do not wait until the individual becomes employed; transportation options are part of any quality job match
3. Determine the commute time that the individual can tolerate
4. Develop an affordable budget for transportation
5. Determine if the job seeker qualifies for reduced transit fares, subsidies, or Social Security Work Incentives
6. Consider car-pooling, ride sharing, advertising within safe networks, paying a co-worker, walking to a pick up point

Do not give up; be creative and tenacious. The more individuals you involve in the process the more creative the ideas will become and the quicker the solution will be found.

Several organizations in Florida are collaborating to create innovative transportation solutions. For more information please visit the Florida Developmental Disabilities Council Website at: www.fddc.org.

“To Disclose or Not to Disclose, That is the Question”

“The Americans with Disabilities Act (ADA) makes it unlawful to discriminate in employment against a qualified individual with a disability. To be protected under the ADA, you must have or be regarded as having a substantial, as opposed to a minor, impairment. A substantial impairment is one that significantly limits or restricts a major life activity such as hearing, seeing, speaking, walking, breathing, performing manual tasks, caring for oneself, learning or working.

If you have a disability, you must also be qualified to perform the essential functions or duties of a job, with or without reasonable accommodation, in order to be protected from job discrimination by the ADA. This means two things. First, you must satisfy the employer's requirements for the job, such as education, employment experience, skills or licenses. Second, you must be able to perform the essential functions of the job with or without reasonable accommodation. Essential functions are the fundamental job duties that you must be able to perform on your own or with the help of a reasonable accommodation. An employer cannot refuse to hire you because your disability prevents you from performing duties that are not essential to the job.” (Equal Employment Opportunity Commission)

Disclosure is a personal decision. It starts by choosing job duties or a career path that matches the job seeker’s preferences, interests and skills and desired workplace culture. Typically one discloses a disability only as necessary and only to those who need to know, such as a supervisor, to ensure accurate and fair understanding of the job seeker. But this is always the job seeker’s decision not the employment specialist’s.

As an employment specialist your role is to support the job seeker in developing the plan regarding whether or not to disclose.

When disclosing, information should be shared so that it is clear, understandable and does not misrepresent the job seeker’s ability to work. When information is handled correctly, disclosure can drive the discussion surrounding accommodation. The Americans with Disabilities Act (ADA) protects against discrimination of persons with disabilities but it does not guarantee hiring. The ADA requires employers to make reasonable accommodations for individuals who disclose that they have a disability.

Developing a Plan to Determine Whether or Not to Disclose

1. Using the information learned during Discovering Personal Genius, with the job seeker and any other individuals he/she wants to include, list any situations where accommodations may be needed.
2. Assess which behaviors, tasks, or situations are relevant to job duties the person is seeking. Obviously there is no need to disclose what does not impact employment.

When the Decision is to Disclose

- ✓ If there is a need to disclose due to impact upon employment, determine what accommodations are needed, and when possible use low-tech solutions.
- ✓ Assist the job seeker with sharing his/her strengths as they relate to the work place and performing the job duties for the business.
- ✓ When disclosing to the employer, include what accommodation strategies will work.
- ✓ Keep the discussion brief, clear and to the point by defining the concern, how it may impact performance, and the accommodation that effectively addresses the concern.

Continuous Learning to Enhance Staff Skill Sets

Building Capacity of Direct Support Professionals Through Performance-Based Training

Building capacity in reference to Florida Rural Routes to Employment first involves strengthening direct support professionals' knowledge, skills, and abilities. This enhances the capacity of organizations to implement employment best practices on a wide scale. Capacity building though is more than just training. It involves analysis of how effectively staff performance and skill development are implemented to support individuals with disabilities becoming employed. Measuring how well direct support professionals embed new skills and abilities insures that knowledge gained is applied. Performance-based learning provides the structure to measure this effectiveness.

The Institute for Applied Behavioral Science reports that learners retain:

- 10% of what is read
- 20% of what is heard
- 30% of what is seen
- 50% of what is heard and seen at the same time
- 70% of what the individual says or writes
- 90% of what the individual says as they do an activity

People learn more by performing tasks than from reading, seeing, or hearing about how to do a task. Staff development and training models regularly use reading, lecture and demonstration. Performance-based training focuses on teaching new skill sets (employment best practices) through didactic (classroom) training, hands on exercises, immersion activities, community-based experiences, and fieldwork. These teaching processes are not only focused on learning new skill sets, the participants try out and practice new strategies under the guidance of subject matter experts.

When participants can effectively apply new information in their job duties then knowledge transfer and proficiency is more easily measured. Information learned is not knowledge until it is effectively applied. Managers and staff can then track outcomes and hold employees accountable through staff performance plans used to evaluate and hopefully reward employees' performance. This provides additional information to track the progress of the organization's support for capacity building.

Redefining Staff Roles from Caregiver to Community Builder

When using more traditional models of providing supports to individuals with disabilities, we tend to think in terms of giving care and helping the individual complete a particular task. Using best practices to support employment outcomes for individuals with disabilities, we think in terms of community building. Disability systems that are deficit based, dependent on professionals and public funding are missing out on the capacity for community members to help increase employment for individuals with disabilities.

Individuals and communities thrive when citizens are involved in all aspects of community life. Community building increases the sense of belonging for individuals. This contributes to individual well-being. When people work together with shared goals and shared expectations, a stronger sense of community results. Community building is grounded in the concept of inclusion; diversity and difference are leveraged as strengths.

During Discovering Personal Genius, relationships in the job seeker's life, along with others who are connected to the job seeker, are identified. This is Relationship Mapping. During job development, these social connections are used to "open doors" and to augment employment options. These connections may include individuals, groups, neighborhoods, and organizations.

Community Mapping is also explored during the discovery process to identify what assets and resources are available that may help to support employment outcomes for job seekers.

Principles of Community Building

- ✓ Each community consists of individuals, organizations, churches and businesses with associated skills, talents, and resources that can be organized to improve situations and assist with achieving outcomes for it's citizens, including employment
- ✓ There is "formal" associational life in most communities. These are easy to recognize and access: Churches, Civic Clubs, Business associations, community sports teams or clubs
- ✓ There is also "informal" associational life, which can often be richer and more relevant to an individual's vocational themes. Rarely advertised broadly, these are groups that are loosely affiliated due to hobbies, special interests, or seasonal activities. Examples include the neighborhood book club, friends who make quilts together on Sunday afternoons, local computer "geeks" who get together to share ideas, dart players at a local tavern
- ✓ Planning around strengths instead of deficits is encouraged since healthy communities develop out of individuals strengths, gifts, skills, capabilities, creativity and associations
- ✓ Several individuals working together to achieve an identified outcome can do more than individuals in isolation

Embedding Community Building into Our Work With Job Seekers

- ✓ All job seekers have personal genius
- ✓ Connecting with local individuals, associations, volunteer groups, can help us achieve better employment outcomes
- ✓ The work we do is relationship-driven so we must build relationships, and not just with those we are comfortable with, but with those we have never included as resources in our work. We already know what our friends and colleagues know. Getting new ideas requires new information from other sources
- ✓ Trust is created out of how we care for one another
- ✓ Re-vamp hiring processes to attract people with strong social capital who understand techniques that "get" people employed
- ✓ Focus resources on staff training in best practices, pair staff with individuals who have strong social capital, have good community building skill sets and achieve high quality outcomes
- ✓ Encourage staff to build good relationships grounded in trust and respect between the job consultant and job seekers, their family and significant others

- ✓ Utilize Community Action Teams

The Discovery Staging Record & Vocational Profile: Effective and Efficient Narrative Writing

Effective communication of factual information is a powerful skill, and those who have this skill-set tend to be more successful. In our work, the purpose of documentation is to support the highest quality outcomes for the job seeker. Research based studies demonstrate the critical need for good oral and written communication to achieve quality outcomes. Just as there are best practices regarding employment supports and services, there are best practices regarding professional person-centered writing. Communication best practices require good listening skills and the ability to observe details accurately and objectively. This means one is noting facts, not opinions or making judgments. Professional writers often speak of the challenge to effective writing as knowing what to “take out” not what to “put into” the narrative, discerning what is essential and what is not essential. There are many rules for writing. It is important to focus upon skills required to create consistent, relevant content through detailed, accurate, clear language.

Key Components of the Discovery Profile

- ✓ Information and content is organized using the *Discovering Personal Genius Staging Record* (DSR)
- ✓ Details are focused and structured in a cohesive manner
- ✓ Language accurately describes events and experiences
- ✓ Sentence structure follows grammatical rules
- ✓ Grammar and spelling are checked for errors

Sentence Structure – include only essential words, keep the sentence short and to the point, and use details that support the content.

Rule – Sentences are efficient, clear and concise.

Paragraphs – content should be focused and consistent with the sentences to support the main point.

Rule – paragraph structure uses clear, understandable sentences, which express only the essential details that are easily understood, important and essential.

Narrative Format – forms a consistent structure. The *Discovering Personal Genius Staging Record* is the narrative format that guides the profile development for documenting events, experiences, and objective observations. Following this format ensures that the details of what occurred during the discovery activities, the names of individuals involved are recorded and the outcomes and next steps are identified.

Writing Guide:

- ✓ Make entries as close to the time of job seeker contact as possible
- ✓ Ensure that spelling, grammar and punctuation are correct * (Use the Tools – Spelling and Grammar Tab frequently!)
- ✓ Concisely structure the narrative and include only essential information
- ✓ Remember to record the names of people involved in each conversation, interaction and activity.
- ✓ When documenting observations, note and describe the facts, e.g. “Ann appears to enjoy music; she makes up words when she does not know the song.”
- ✓ Be mindful of the words you choose. Ensure you are respectful, non-judgmental and use People First Language. When working with individuals with behavioral health diagnoses use recovery-focused language
- ✓ Ensure you are well versed in the legal and ethical requirements that are the policy and practice of the organization where you are employed.

Quick Reference Guide for Effective Writing

- ✓ Write notes immediately after the contact
- ✓ Be Concise
 1. State information in as few words as possible
 2. Edit out any unnecessary words

Examples:

Less effective writing: I met with Clara at Pace Boot Shop, where she is completing an internship. Her assigned task was hanging men’s clothes and women’s clothes. When completing this task she had

difficulty determining the men's clothes from the women's clothes and made numerous mistakes in hanging the clothes. To assist her in learning to hang the clothes correctly, I demonstrated how to do it.

More effective writing: I met Clara at Pace Boot Shop, where she is completing an internship. Her task was hanging adult clothes. She had difficulty determining men's from women's clothes. To assist her, I pointed out that the men clothing tags are blue and the women's tags are white.

✓ Be Clear

Ensure statements are not ambiguous or confusing

✓ Be Concrete

1. Show instead of tell
2. State specific behaviors and statements that you observe and/or hear

Examples:

Not Concrete: Joe was nervous.

Concrete: Joe was biting his nails and pacing from his chair to the door.

Not Concrete: Anna was non-communicative.

Concrete: Anna did not speak or make eye contact.

Not Concrete: Ed's mother was not supportive of him working in the job at the hospital.

Concrete: Ed's mother indicated she did not want him to work in any department of the hospital because he could "get sick from being around germs."

Record observations, do not make judgments, and avoid use of labels

Examples:

Observation: Sara separated the whites from the colored clothes, put the white clothes in the washer, measured a quarter cup of detergent, poured the soap into the machine, set the washer dial for whites, closed the lid and pressed the start button.

Judgment: Sara is competent in washing clothes.

Observation: Fred was not home when I arrived to pick him up for the scheduled meeting with the owner of Auto Zone.

Judgment: Fred does not want to work.

Use Respectful, People First Language that is neutral or positive and strengths based

Examples:

Poorly written: Sue is handicapped and confined to her wheelchair.

Respectfully written: Sue uses a wheelchair.

Engaging Stakeholders and Building Partnerships

Imbedded within the methodology of Florida Rural Routes to Employment is a strong focus on partnerships with the “formal and informal” community leaders. These relationships will continue to be strategically developed along with the use of media to increase opportunities to further impact change in Florida at the political level.

Underlying the work of Center for Social Capital is a focus on Employment First.

Effective Partnerships Between Service Systems

Increasing the number of individuals with disabilities included in the workforce demands that organizations work together to obtain the maximum benefit from resources and expertise. This partnering should include not just traditional systems such as providers, Vocational Rehabilitation and America’s Job Centers, but should also include community movers and shakers, politicians, spiritual leaders, and business owners. Developing partnerships involves building, enhancing and maintaining the connections. Organizations may have different missions, but improving communities by increasing employment is typically a common interest of any human services entity. By defining employment as a common interest, strategic goals among partners can be developed.

With collaboration comes:

- ✓ Enhanced resources and expertise
- ✓ Wider outreach and dissemination of information
- ✓ Greater visibility of needs and quality outcomes
- ✓ Reduction in duplication
- ✓ Increased support through public and private stakeholders
- ✓ Possible cost reduction
- ✓ Improvement in employment outcomes for individuals with disabilities

Trust builds effective partnerships. Strategic planning must respect all organizational cultures and identify processes including effective communication, shared and critical tasks, and overall responsibilities. Trust is built when members are open and honest, keep commitments and respect the collaboration's role related to each individual organization's mission and expected outcomes.

The success of a partnership also depends on effective communication, goal clarity, and organized, efficient meeting facilitation. The meeting structure should be agreed on, ground rules established, and opportunities for all members to be heard guaranteed.

The following steps foster effective collaborations:

- ✓ Identify potential stakeholders/partners
- ✓ Draft mission statement, goals and outcomes
- ✓ Ensure goals are clear and realistic
- ✓ Ensure members are invested in achieving identified outcomes
- ✓ Establish realistic timelines
- ✓ Utilize a clear and simple action plan to hold partners accountable for commitments

Strategies For Effective Policy And Practice in Rural Communities

Rural communities are unique and are often identified by low population rates, minimal economic opportunities, high unemployment rates and few employment services to support individuals with disabilities. Also, high staff turnover exists among the providers of employment services that do exist. The partnership between the *Florida Developmental Disabilities Council* and *The Center for Social Capital*, the not-for-profit arm of *Griffin-Hammis Associates*, is impacting employment outcomes for individuals with disabilities in Florida's rural communities through the *Florida RRTE project*. Performance-based training in Employment Best Practices is being provided to the direct support professionals from organizations that were identified as development sites.

Building staff capacity is enhanced when practice and policy are aligned and employment outcomes are incentivized. Since policy guides practice, supportive policies aid effective system change. The *Florida Developmental Disabilities Council* has dedicated numerous resources to solve issues pertaining to disability policy, practice and funding. Their strategic goals continue to focus on uncovering barriers and supporting resolutions to reduce and eliminate those barriers. The following issues and needs became apparent during the *Florida RRTE project*. These issues can be addressed through the continued efforts to align policy and practice.

- ✓ Enhance training for Direct Support Professional in Employment Best Practice
- ✓ Bring Employment Best Practices to scale statewide

- ✓ Train organizational executives and managers in Leadership Best Practices
- ✓ Clarify and Monitor quality outcomes
- ✓ Develop rapid response for ineffective use of public dollars
- ✓ Develop Collective Impact across Human Services systems
- ✓ Eliminate duplication across systems
- ✓ Braid/blend/amalgamate resources across systems
- ✓ Consistently incorporate rural communities into planning
- ✓ Eliminate ineffective policies and practices

Federal agencies have also created numerous initiatives to address such issues to support states in aligning policy, practice and funding:

- ✓ Projects of National Significance – *Partnerships in Employment and System Change* (Administration on Intellectual and Developmental Disabilities; www.acl.gov)
- ✓ Office of Disability Employment Policy Initiatives – *Employment First Leadership State Mentoring Program; Integrated Employment Toolkit; Customized Employment Initiatives* (Office of Disability Employment Policy - US Department of Labor; www.dol.gov/odep/)
- ✓ Medicaid Initiatives – *Home and Community Based Waiver Technical Guide; Community First Choice Options; Balancing Incentives Program; Money Follows the Person* (Centers for Medicare & Medicaid Services: Home www.cms.gov/)
- ✓ PROMISE - *Promoting Readiness of Minors in Supplemental Security Income* (<http://www2.ed.gov>)

Florida, as with all states, can tap into the resources that are available through federal agency initiatives. Support, consultation and technical advice are available to align policy with practice. Many of the leaders in Florida and the consultants through the Center for Social Capital and Griffin-Hammis Associates are involved in these Federal initiatives. The available Resources and Policy Tools generally fall into the following categories:

- Provider Transformation
- Implementing Best Practices
- Expansion of Business Strategies and Effective Practice
- School to Work Transition
- Policy Assessment, Development and Implementation
- Funding and Rate Restructuring
- Promoting Partnerships Across Systems

- Performance-Based Outcomes Development
- Cross System Training and Professional Development
- Measuring Progress Across Systems
- Capacity Building in Effective Practices
- Employer Engagement
- Strategies for Aligning Policy, Practice and Funding Across Systems
- Funding Alignment and Flexible Funding Strategies

It is evident that the partnerships forged through the *Florida Developmental Disabilities Council* initiatives have impacted Florida's strategic goal to increase employment outcomes for individuals with disabilities. Incorporating federal initiatives with state strategic planning can augment the good work happening around employment in Florida.

Commitment to Employment as a Priority – Florida Employment First

Employment is an important part of having a quality life. It adds to our identity, creates value in our day, and offers a means to develop relationships, social capital, and financial security. Employment for individuals with disabilities has historically not been a focus of disability services and supports. Individuals with disabilities have for far too long been denied employment and the richness it brings to our lives.

Over the last several years state and federal initiatives have aimed to change this by focusing resources to improve employment outcomes for individuals with disabilities. As a result employment best practices, common outcome expectations, strategies for organizational transformation and more effective policy have emerged.

This growing focus on employment has been termed Employment First, defined as:

“... a concept to facilitate the full inclusion of people with the most significant disabilities in the workplace and community. Under the Employment First approach, community-based, integrated employment is the first option for employment services for youth and adults with significant disabilities. Integrated employment refers to jobs held by people with disabilities in typical workplace settings where the majority of persons employed are not persons with disabilities, they earn at least minimum wage and they are paid directly by the employer.” ODEP, 2012

Key Principles of a National Employment First Strategic Framework (ODEP)

1. Disability is a natural part of the human experience

2. Employment is a valued activity
3. Self-determination and informed consumer choice are essential elements related to employment
4. All individuals with disabilities should be empowered to obtain employment consistent with their interests, strengths, abilities, and preferences
5. Employment providers are expected to use best practices
6. Technical assistance should be made available to *direct support professionals* to build capacity
7. Natural supports should be developed

Florida is one of many states that have an Executive Order signed by the Governor to create public policy solutions and strategies aimed to improve employment outcomes for individuals with disabilities. The *Florida Development Disabilities Council* has created an Employment Partnership Coalition, Employment First Collaborative Team, and Employment First Florida Grassroots Group.

“The *Governor's Commission on Jobs for Floridians with Disabilities* was created by Executive Order 11-161 to advance job and employment opportunities for persons with disabilities in order to help those individuals achieve greater independence. The mission of the Commission is to provide public policy solutions and strategies to the Governor and state policymakers to fulfill this vision for Floridians with Disabilities.”

“Florida is taking a broad approach by including all major state agencies and disability service organizations in planning for Employment First. Florida’s work will be focused on building capacity and sustainability, maximizing resources through systems coordination, and evaluating outcomes.

At the state level, an Employment Coalition with over 40 members representing all major state agencies and disability service organizations will meet to work toward implementation of Executive Order 13-284 and the Governor’s Commission for Jobs for Floridians with Disabilities 2013 Report recommendations. A smaller group and sub-committees will likely be formed from this coalition to ensure activities move from the planning to implementation stages. From the grassroots level, self-advocates tell us it is important to ensure that everyone’s voice is heard—family, job developers, teachers, and self-advocates. Florida’s Alliance for Full Participation, which is a grassroots level group working to improve employment outcomes, will ensure that everyone’s voice is heard and will assist with getting the message out in their communities. Moreover, the Employment First Grassroots Florida Group will reach broadly into the trenches of Florida via webinars.

Our desired ultimate outcome is for Florida to have a better system that supports employment and self-sufficiency for all individuals with disabilities!” (*Florida Developmental Disabilities Council – Employment First Florida*)

For more information visit the Florida Developmental Disabilities Council website at:
www.fddc.org/Employment

APPENDIX A: Government Benefits and Asset Development

Government Benefits and Work

Many individuals receive some combination of government benefits or services such as Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI), Medicare, Medicaid, subsidized housing, food stamps, or the Medicaid-Waiver. Each program has different rules surrounding earned income and continued eligibility. While concerns about the impact of earned income on benefits are legitimate and must be taken seriously, it is also true that there are many misunderstandings about how these programs work. In the absence of a clear understanding of the specific rules and the opportunities available to working individuals, it is common for benefit recipients to limit their income. The unfortunate reality is that doing so often guarantees a life of poverty and prevents people from taking the steps that would help them move towards financial stability and economic freedom. A brief overview of the two primary benefit programs, Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI), are provided here along with the resources available to assist people with benefits planning and management. More information on each of the programs and work incentives detailed below is available at the SSA website: www.ssa.gov.

Supplemental Security Income (SSI)

SSI is a financial needs-based program administered by the Social Security Administration (SSA). To be eligible, individuals must both experience a disability (or be age 65 or older) and have financial need. To demonstrate financial need, individuals with disabilities must pass both an income and an asset test. Once eligible, the person must continue to meet the asset test each month. Income is evaluated on a monthly basis as well to determine whether the person is eligible for a cash benefit, and if so, how much the cash benefit will be. In Florida, individuals eligible for SSI are also automatically eligible for Medicaid. Understanding the continuing eligibility rules for both the SSI cash benefit and for Medicaid remains one of the biggest challenges, both for individuals receiving benefits as well as for the ES' and agency personnel providing support.

Earned Income and SSI: When SSI recipients begin earning money, either through a wage job or self-employment, the SSI program applies a formula to determine how much of their earned income "counts". It is true that earned income may cause a reduction in the SSI cash benefit; however, because of this countable earned income formula, it is also true that the person's **total monthly income when working is always higher than when on SSI alone**. This last point is the most critical, and one that is frequently overlooked when the income analysis focuses on the impact to the SSI check alone. To calculate the countable earned income, the first \$65 of earned income is excluded (subtracted) and the

remainder is divided in half. This figure, the countable earned income, is subtracted from the total SSI benefit to determine the adjusted SSI cash benefit amount. What this means is that at a minimum a little less than half of the earned income counts, and as a result it is **mathematically impossible to have less income when working than when on SSI alone**.

The formula described above is automatic and always applies to earned income. There are additional deductions that may apply as well and further reduce the amount of countable earned income. In order to use these additional deductions, called work incentives, the person must meet the specific criteria described below. In most cases, use of work incentives results in an increased amount of the SSI cash benefit because they reduce the amount of countable earned income.

Impairment Related Work Expenses (IRWE): To qualify as an IRWE, the expense must meet 3 criteria. It must be: 1) paid for out of pocket (the person pays for the expense directly and is not reimbursed for it), 2) necessary for work, and 3) needed to manage their disability or a condition for which they are being treated. If the person reports expenses that qualify as IRWEs to their SSA representative, the amount s/he paid for the IRWE is subtracted from their earned income along with the \$65 earned income exclusion. The net impact from an IRWE is usually for the SSI cash benefit to increase by half of what was paid for the IRWE. If a person paid \$100/month in medical copayments that qualify as IRWEs, for example, in most cases this would result in the SSI cash benefit increasing by \$50.

Blind Work Expenses (BWE): BWEs are similar to IRWEs but have several critical differences. First, only people who meet SSA's definition of blindness qualify to use BWEs. Second, instead of meeting the 3 IRWE criteria listed above, anything that can be "reasonably attributed to the earning of income" may qualify as a BWE. Finally, in the SSI formula BWEs are subtracted after dividing by two, and as a result the net impact of claiming a BWE is usually for the SSI cash benefit to increase by the full amount paid for the BWE. In the example above, if the person paid \$100 for medical copayments and claimed these as BWEs, in most cases this would result in the SSI cash benefit increasing by \$100.

Student Earned Income Exclusion (SEIE): In order to qualify for the SEIE, the person must be under the age of 22 and regularly attending school. For those that qualify for SEIE, there are additional monthly and annual income exclusions that may apply. In 2015, the first \$1,780 earned each month does not count, until the person reaches the annual SEIE limit of \$7,800 (2015 amount). Since many students work part-time, using SEIE often means that little to none of their earned income may count. A student earning \$500/month, for example, would have total annual income of \$6000. If the person qualified for SEIE, however, none of this income would count because both the monthly and annual income amounts are less than the SEIE amounts. This means that the person would maintain their full SSI cash benefit for the entire year.

Plan to Achieve Self-Support (PASS): PASS is a very powerful work incentive that includes both income and resource exclusions. To be eligible for PASS, the person must 1) have another source of income besides SSI (e.g., earned income, SSDI, etc.), and 2) have a feasible work goal, and 3) have

expenses associated with reaching the work goal. Achieving the work goal must also be expected to result in either a reduced SSI cash benefit or a reduced need for support. PASS allows the person to set aside money in a separate account to be used for the work goal. The money that is set aside does not count as income, and funds in the PASS account are excluded from counting as a resource. In the SSI formula, the monthly PASS contribution is subtracted after the income is divided by two, which in most cases means the SSI cash benefit increases by the same amount. A person who sets aside \$200/month in the PASS account, for example, typically would see the SSI cash benefit increase by that same \$200.

SSI and Medicaid: In Florida, individuals automatically qualify for Medicaid as soon as they are eligible for SSI. Medicaid coverage begins the month of SSI eligibility and continues automatically any month the person receives an SSI cash benefit. Because of this, many people believe that they must have at least a \$1 SSI cash benefit in order to maintain Medicaid. This is not true, however. **Under Section 1619(b) of Medicaid policy, the person may retain Medicaid eligibility even if they stop qualifying for a SSI cash benefit due to work income, so long as their annual income is less than the state threshold.** In 2015, this state threshold amount is \$30,594. Additionally, some people may qualify for an individual threshold that is higher than the state average. In order to qualify for Continued Medicaid Coverage under Section 1619(b), the person must continue to meet all the other SSI eligibility criteria (i.e., continue to have a disability, continue to have resources beneath the resource limit) and need Medicaid in order to work. Continued Medicaid under Section 1619(b) does not occur automatically, so people whose earnings are projected to go over the 1619(b) state threshold amount should meet with their SSI representative to discuss continued Medicaid coverage.

Social Security Disability Insurance (SSDI)

SSDI is an entitlement program. Individuals who have contributed to the Social Security system through their FICA payments are entitled to draw a Social Security benefit in the event that they die, retire, or experience a disability. Eligible individuals may draw a cash benefit and/or receive Medicare through the SSDI program. The amount of the SSDI cash payment is based on the FICA contributions paid, so there is no set amount for an SSDI payment. The amount will increase annually with COLA. Additionally, if the worker begins earning at a higher level and FICA contributions increase as a result, over time the cash benefit amount could increase as well. There are no asset or resource limits for the SSDI program. There are income limits, however, that apply both at the time of application and also for continued eligibility.

Medicare: SSDI beneficiaries are automatically eligible for Medicare. However, Medicare coverage will not begin for 24 months after the date of entitlement. Beneficiaries are entitled to premium-free Medicare Part A for any month where the SSDI cash benefit is received. Beneficiaries are responsible for paying the Part B premium, which is typically deducted directly from the SSDI cash benefit. Ongoing eligibility for Medicare will be discussed in the sections below.

SSDI and Earned Income: Earned income can impact ongoing eligibility for both SSDI cash benefits and for Medicare. After establishing eligibility for benefits, SSDI beneficiaries pass through several

phases as they return to work, including the Trial Work Period (TWP) and the Extended Period of Eligibility (EPE). Each phase has different rules, regulations, and criteria, so it's critical for the person to know their current phase.

Trial Work Period (TWP): During the TWP, SSDI beneficiaries are guaranteed to receive their cash benefits regardless of the amount of money earned. Each SSDI beneficiary receives 9 total TWP months. These 9 months do not have to be used consecutively, and to complete the TWP, the person must use the 9 TWP months within a 60-month window. To count as a TWP month, the person must earn over a certain amount (\$780 in 2015) or, if they are self-employed, work 80 hours or more per month in their business. The 80-hour rule applies **only** to people who are self-employed.

Extended Period of Eligibility (EPE): The EPE begins the next month after the 9th TWP month and continues for the next 36 consecutive months. During the EPE, countable earnings are compared to an annually established limit, called Substantial Gainful Activity (SGA) to determine whether or not the beneficiary is eligible for the SSDI cash benefit. SGA changes annually. In 2015, the SGA amounts are \$1090 for beneficiaries who are not blind, or \$1820 for beneficiaries who are blind.

Countable Earned Income Calculation: To calculate countable earned income, the SSDI program uses a different formula. The formula starts with the gross income earned for that month, and then any applicable deductions (or work incentives) are subtracted. The result is the countable earned income, and this is the figure that is compared to SGA. Generally speaking, if the countable earned income is greater than SGA, the person is not eligible for the SSDI cash benefit that month. If the countable earned income is less than SGA, the person is entitled to the SSDI cash benefit that month.

The SSDI work incentives are described below. More information is available online at www.ssa.gov.

Impairment Related Work Expenses (IRWE): IRWEs are any expenses that are paid for out of pocket by the beneficiary, are necessary for work, and are related to the disability or condition for which the person is being treated (all three of these must be met in order for the expense to be an IRWE). Common examples of IRWEs include: specialized transportation, medication co-pays, and attendant care service expenses (when the attendant care service relates to work). IRWEs apply to both wage income and self-employment income.

Subsidy: Subsidy typically applies if beneficiaries receive extra support or supervision at work, or if they produce at a lower rate than their co-workers. If either or both of these situations apply, the value of the subsidy is calculated and subtracted from the countable earned income. If the person produces approximately 75% of the amount her coworkers produce, for example, she may have a 25% subsidy. In this case, 25% of her earnings would be deducted from her gross earnings to calculate her countable earned income. Subsidy applies only to income from wage employment.

Unpaid Help/Unincurred Business Expenses: Unpaid help and unincurred business expenses apply only to income from self-employment. Many business owners with disabilities receive support running

their business from family and friends. If these supports are donated, SSDI allows the “value” of the services to be deducted from the monthly countable earnings. Expenses paid for by another source can also be deducted when calculating the countable earned income. Two types of unincurred business expenses are possible: 1) expenses are paid for by another agency or entity, such as VR paying for the phone bill, or 2) expenses are not specifically incurred by any agency, such as when a community center provides office space for no charge. The value of these expenses is deducted from the average monthly net earnings from self-employment to calculate the countable monthly income.

Expedited Reinstatement of Benefits (EXR): After completion of the EPE, if countable earnings exceed SGA, beneficiaries will terminate from the system. This means they will no longer be eligible for cash benefits. However, EXR provides an important safety net. For the next 60 consecutive months following the termination month, the beneficiary can be reinstated on cash benefits without filing a new application if the business closes or earning decrease. Up to 6 months of provisional benefits can be granted at the time the request is filed. Assuming the request was not fraudulent, these benefits would not have to be repaid even if the request were denied.

Extended Medicare Coverage: Once the initial 24-month waiting period is complete, beneficiaries are guaranteed at least 93-months of Medicare coverage following the 9th TWP month. Calculation of the exact number of months varies depending on the individual’s earnings record. Once Extended Medicare Coverage ends, however, individuals have the option to purchase it by paying for the Part A and Part B premiums.

Work Incentives Planning and Assistance Project (WIPA)

SSA, as authorized through the Ticket to Work and Work Incentives Improvement Act of 1999 (TWIWA), has established cooperative agreements in all states (and US territories) with community agencies or organizations to provide WIPA services. Individuals working for the WIPA projects are referred to as Community Work Incentives Coordinators, or CWICs. CWICs serve every region of the state, and their primary purpose is to assist beneficiaries with understanding and predicting the relationship between work and SSA benefits.

CWICs can assist beneficiaries who are working or considering work to analyze and predict the impact of current or projected earnings on the benefits received. CWICs can also educate individuals and their family members about the different work incentives for which they might be eligible and even assist with accessing these.

Asset Development

Because the SSI program has stringent asset limits, many SSI recipients believe that asset development is simply not an option. The SSDI program does not have asset limits, so it is easy to assume that asset development would be a key strategy for SSDI beneficiaries. Unfortunately though, because there are

so many misconceptions about how the program works, few SSDI beneficiaries pursue asset development either. The impact of this is particularly devastating as asset development is one of the most powerful strategies available to move towards financial stability and economic power.

Although the SSI program does have asset limits (\$2000 for individuals or \$3000 for a married couple), the resources described below are excluded from this limit. Each of these has the power to allow SSI recipients to accumulate assets and begin building wealth. Because the SSDI program has no asset limits, these resource exclusions are options for SSDI beneficiaries as well.

Home Ownership: SSI recipients may exclude the home they live in, regardless of its value. If a parent gifts ownership of a house to a child, it only counts as income in the month it is received.

Business Ownership: Under the Property Essential to Self-Support (PESS) policy, all assets owned by the business, including cash in the business account, are excluded from the individual resource limit. PESS applies only to sole-proprietorships or partnerships, so self-employed SSI recipients who need to maintain eligibility for SSI or Medicaid must only use one of these business structures.

Plans for Achieving Self-Support (PASS): As described in the Government Benefits and Work section, funds set aside in PASS accounts are excluded from counting as either income or assets. Additionally, PASS funds are excluded by Medicaid, TANF, food stamps, and HUD assistance programs

Individual Development Accounts (IDAs): Individual Development Accounts or IDAs are part of a broader economic development initiative designed to help low-income individuals build assets and increase economic power. Through an IDA, people can contribute earned income to the IDA, and these funds are then matched. The amount of match differs from one IDA program to another.

The money saved through the IDA can be used to pursue post-secondary education, purchase a home, or start a business. IDAs established through either the Assets for Independence (AFI) or Temporary Assistance for Needy Families (TANF) are excluded from counting as resources for SSI recipients. See www.cfed.org to search by state and find the IDAs currently offered in Florida.

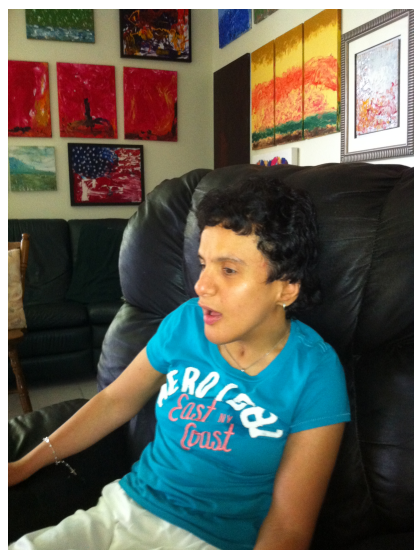
Post-Secondary Education: Grants, scholarships, or gifts used to pay for post-secondary education expenses (e.g., tuition, fees, etc.) are excluded as resources for 9 months. Additionally, any financial assistance received through the Higher Education Act (HEA) does not count as income or resources.

Achieving a Better Life Experience (ABLE) Act: The ABLE Act, signed into law in 2014, allows individuals with disabilities to set up one ABLE account. ABLE funds may be used to pay for disability

related expenses and for limited financial investment. Funds may be contributed by anyone, including the individual, family members, and friends. Annual contributions may not exceed the IRS annual gift-tax amount (\$14,000 in 2015). The ABLE Act is mandated through federal legislation, but each state is in the process of developing its own rules and regulations.

Although the SSI asset limit remains firm, the reality is that any of the above programs offer tremendous possibilities to build resources and accumulate wealth while maintaining access for either SSI or Medicaid. Employment teams must support people to consider all options and to begin to view employment as the best pathway to break out of poverty and ensure financial stability, rather than as a risky option that threatens government benefits. In exploring this fully on an individualized case-by-case basis, we can better support people to understand the true impact of employment on work and the range of options available to them to not only earn more money but to actually end poverty and move towards achieving their own financial independence and economic goals.

Cover art provided by Luz Aponte



LUZ ELENA APONTE

Dare to Dream

LUZ Elena (Lucy) Aponte born in Ohio and moved to Florida at 9 years old. Lucy owns Life's Unlimited Zenith, LLC., a fine art business selling her art creations. Notwithstanding her disabilities, Lucy has evolved into a creative spirit. Using various techniques, and supported by a team, Lucy creates art designs that inspire those who see and purchase them. Lucy has five collections of at least 16 pieces titled ["Dare to Dream"](#), ["Possibilities"](#), ["Believe in..."](#), ["Enjoy Nature"](#) & ["Prosperity."](#) Owning a piece of Lucy's art inspires one to "Dare to Dream" goals and move beyond personal challenges. (www.luzenith.com)

In 2003, Lucy was fortunate to have met David Hammis, who among her great friends, assisted in the development of her business idea and continued supporting in the development of Lucy's business from the benefits planning, PASS, business plan and implementation of the business. David's vision and exemplary & unselfish guidance, from the first team meeting in Lucy's home, led to the final accomplishment of creating Life's Unlimited Zenith. A "Dream" turned into a reality. Thank you David.

Lucy is an advocate for persons with disabilities and presents, with the use of assistive technology and supports, on various topics like self-determination, transition from school to work, Micro-enterprise and others.

She inspires others to follow her family's motto: To Love, To Learn, To Share and To Serve.

*"Not being able to speak is not the same as
not having anything to say, to do, to learn, to dream!"*