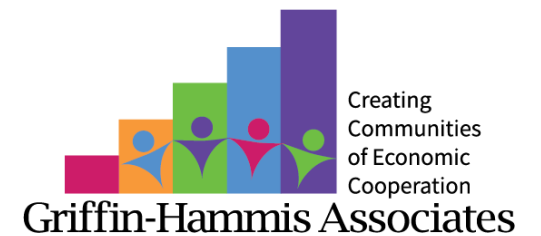


# Setting up for Success!

Ashlea Lantz

Janet Steveley



# Objectives

1. Describe 4 Indicators of quality CE documentation
2. Identify areas of improvement in documentation examples
3. Describe ways to set up CE for success?
4. Describe what it means to deliver Customized Employment with fidelity

# Core concepts of Customized Employment

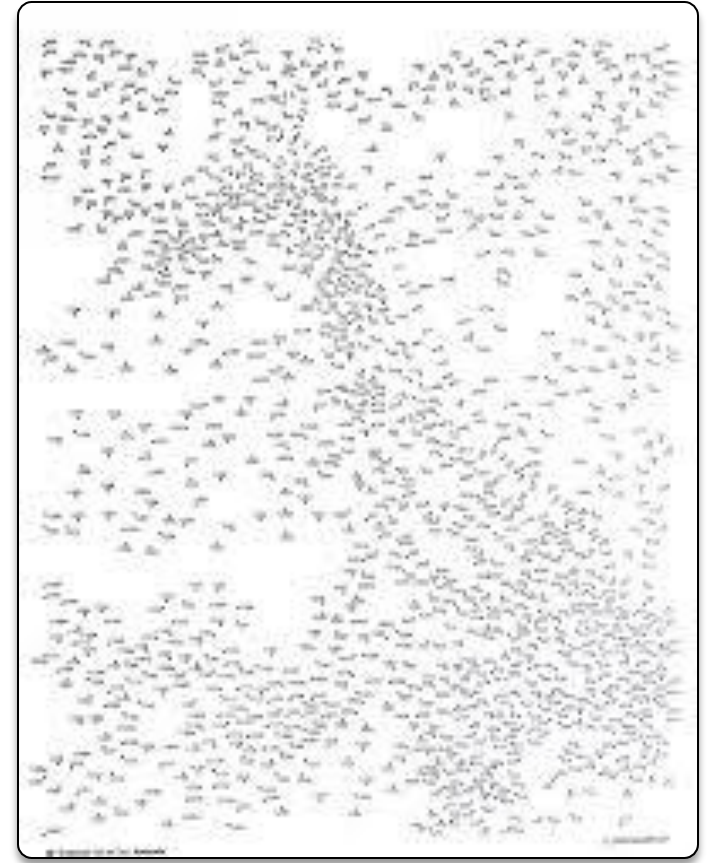


# Who do you see?



- What does an “open and positive approach to life” look like?
- Our perspective directly impacts the way in which we see people and possibilities
- What is influencing your perspective?

# What do you see?



# Let's do the math!

- Salary of \$40,000 (36% Benefits and 35% overhead estimates) = cost of FT Employee \$73,440

$$\$40k \times .36 \text{ (benefits)} = \$54,400$$

$$\$54,400 \times .35 \text{ (overhead)} = \$19,040$$

**Total: \$73,440**

- \$73,440 cost of employee / \$4000 (average cost of supported employment authorizations)

13 completed Discovery services, Vocational Profile and Job Development needed to cover cost of FT employee @\$40k/year



# Let's do the math!

- Salary of \$30,000 (36% Benefits and 35% overhead estimates) = cost of FT Employee \$55,080
- \$55,080 cost of employee / \$4,000 (average cost of supported employment authorizations)

10 completed Discovery services, Vocational Profile and Job Development needed to cover cost of FT employee @\$30k/year



# Setting up for Success

## Quality Indicators

- Discovery is done with a sense of urgency
- 4 - 9 weeks

(when you're learning this is unachievable – more like 12-14 weeks)

## Implementation Strategy

- Ideal case load of 5-7 job seekers
- Employment Specialist only does Customized Employment
- Look at funding mechanisms to build and braid funding (if no CE rate) to support small case load





# Setting up for Success

## Quality Indicator

- 4 - 9 weeks
- When you're learning this is unachievable – more like 12-14 weeks

## Implementation Strategy

- Stagger start dates
- Start strong by scheduling neighborhood exploration, interviewing others and familiar activities before leaving the home visit



# CALENDAR



Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2 <b><u>HOME VISIT</u></b>	2	3 <b><u>NEIGHBORHOOD EXPLORATION</u></b>	4	5 <b><u>INTERVIEW OTHERS #1</u></b>	6
7	8 <b><u>FAMILIAR DISCOVERY ACTIVITY</u></b>	9 <b><u>INTERVIEW OTHERS #2</u></b>	10	11 <b><u>INTERVIEW OTHERS #3</u></b>	12 <b><u>FAMILIAR DISCOVERY ACTIVITY</u></b>	13
14	15 <b><u>NEIGHBORHOOD EXPLORATION</u></b>	16	17 <b><u>FAMILIAR DISCOVERY ACTIVITY</u></b>	18	19	20
21	22	23	24	25	26	27
28	29	30				



# Setting up for Success

## Quality Indicator

- Discovery begins with engaging the employment seeker's family, friends and community supports

## Implementation Strategy

- Receive authorization
- Communicate prior to home visit
  - Phone call (set up intake and introduce)
  - Intake (paperwork and re-introduce service delivery and define roles), schedule home visit
  - Complete home visit



# Setting up for Success

## Quality Indicator

- Discovery begins with engaging the employment seeker's family, friends and community supports

## Implementation Strategy

- Regular checkpoints
  - Set regular meetings
  - Check in at each stage
- Sharing the DSR
- Schedule Employment Planning Meeting at start of Discovery



# Key Points to Discuss

- Starts with the person
- Not looking at the job market
- Relies on social capital i.e. connections and relationships
- CE 'feels' different
- Creating vs. placing
- Time frames
- Action oriented
- Advice vs. Hiring
- Themes vs. Job Descriptions



# Activity

1. Groups of 3
2. Assign note taker, list all group member names on document
3. Task: Take 'Key Points to Discuss' and develop a structure for conversation or 1-page document to share with individuals and families
3. Report back and share
4. Submit what you completed to GHA Associate at end of activity (send in 1 copy for each group)



# BREAK



# Capturing Discovery





# Capturing Discovery

## Quality Indicator

- Discovery observations are always written objectively in descriptive sentences, reporting what is seen and heard in a positive manner

## Implementation Strategy

- Stray away from Medicaid Documentation structure
- The DSR is not a “progress note”
- It is a qualitative document that captures who the person is (*it's a story, not a social history*)
- May require time sheet to accompany DSR



# Capturing Discovery

- It begins with intent to capture skills, passions, conditions and contributions of the job seeker
- How?
  - Optimistically
  - Descriptively
  - Non–Evaluative/comparative
  - Sufficient length

*"Discovery provides the evidence for the recommendations for career development and needed services and supports."*

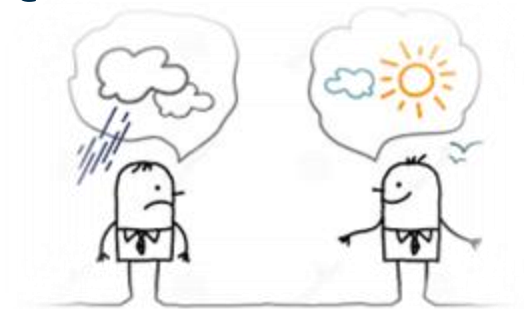
WINTAC, *The Essential Elements of Customized Employment for Universal Application*, p.7



# Capturing Discovery

## Optimistically

- How you perceive and think about the job seeker, their family and their lives matters
- Leaving your bias and judgement at the door
- No relying on previous information
- Assume all things are possible, then figure out the accommodation



# Capturing Discovery



## Descriptively

- Details matter
- Translation of observation
- Describe the individual's life experiences
  - Past employment, education, life activities, skills and other relevant features (NOT checklists, Q/A, or comparative assessments)

*The information contained in the Positive Personal Profile  
directs what comes next in the plan for employment*

---

# Descriptive vs. Judgmental

## Positive & Useful

### Judgmental

- Allen liked (the Discovery activity).
- Allen preferred working with plants to the activity we did last week involving cars.
- Horticulture would be a good area to pursue for Allen.
- Allen was pleasant during the Discovery activity.

### Descriptive

- Allen was up and ready to go for the plant potting activity. He brought his yard work gloves.
- During the plant re-potting activity, Allen stayed focused for about 20 minutes, as compared to the car activity where he only stayed on task for about 5 minutes.
- Allen was able to re-pot ten Begonia plants during the 20 minutes he was there with minimal assistance.
- He thanked the nursery owner and told him he would like to return to the nursery on another day.



# Capturing Discovery

## Non-Comparative/Non-Evaluative

- Detailed, comprehensive narrative form and sufficient length
- Opinions don't answer the question, "who is this person?"
- It's a conversation, not an interrogation



*“Care should be taken to focus on the individual and avoid opinions of the facilitator, professional staff, family member and others.”* WINTAC, *The Essential Elements of Customized Employment for Universal Application*, p.7

# Capturing Discovery

- If we don't capture Discovery...
  - Disservice to the job seeker
  - Disservice to the Employment Specialist
  - Risk that we miss the next steps that lead to customized employment and working at full potential
  - Turnover, turnover, turnover...
  - We miss out on answering the question who is this person?



# Capturing Discovery

Informs those designing the plan for customizing a job

“The Discovery document should summarize information gathered in a way that identified the strengths, needs, and interests of the employment seeker so it can inform those designing the plan for customizing a job with the individual.”

*WINTAC, The Essential Elements of Customized Employment for Universal Application, p.7*





# Sheldon Video



1. Watch Sheldon Video as a cohort
2. Use Zoom chat box to describe in full sentences what you are observing.
3. Reminders:
  1. Optimistically
  2. Descriptively
  3. Non-Evaluative/comparative
  4. Sufficient length

# Capturing the process

Home Visit

Neighborhood Exploration

Interviewing Others

Benefits

Discovery Activities

Informational Interviews

Vocational Themes



# Home Visit

- Meet with the person in their home (their space)
- The person is encouraged to invite family, friends and anyone who knows them well
- It's conversational
- Active – include an opportunity to see things that are important to the person
- Duration 1.5-2 hours

# Example of Home Visit

- Ann lives with her parents in a ranch home in Kansas City. Ann was born in Kansas City and her parents have been lived there all their lives. Ann has two older brothers Joe and John. Ann's dad (Bill) is retired and her mom (Judy) is a receptionist for the school. Since Ann's dad (Bill) has retired he enjoys taking Ann wherever she needs to go and doing some side work working projects.
- Ann's room has pictures of her and her on vacation to Disney, camping and school dances. Ann has a computer in her room, decorations that include bright color paintings she made in school and crafts with friends. She has various books about plants and animals on her book shelves.

*(THIS IS ONLY A BRIEF EXAMPLE...capturing the home visit should be more expansive than example provided)*



# Neighborhood Exploration

- Explore the neighborhood
- Walk the neighborhood
- Conversational and take time to connect with others in the neighborhood



# Example of Neighborhood Exploration

- Ann and her family live in Kansas City (describe specific neighborhood). Ann's family is close to two grocery stores (Hy-Vee and Trader Joe's), she is also near a Dollar Tree, Dot's Frame Shop, Skip's (local restaurant), the local Country Club, a local golf store and various fast-food chains including Burger King, McDonald's, Starbucks, B-Bops. There are a few public bus stops near Ann's home, however she has never taken the public bus before. Dad reiterated he's happy to be her transportation since his retirement. Ann and her family attend church in Kansas City.

# Interviewing Others

- Connect with at least 3 people who know the job seeker well
- Conversational
- Meet with them when it's convenient for them

# Example of Interviewing Others

- Joe (Ann's brother): Joe raves about Ann and shared about how friendly she is. For example, Joe shared whenever they are out and about Ann is always stopped by others she knows. He says, "she knows everybody in town!" Ann was well liked in high school and was elected to the homecoming court. Joe says that Ann will do anything with a smile, she just likes being around positive people. Joe says that when they would go on family camping trips Ann always wants to help with the cooking and getting things ready for s'mores. Joe says any employer would be lucky to have Ann because of her upbeat personality. Joe shared that Ann loved her work experiences in high school where she helped out at the local community center cooking and serving meals and delivering Meals on Wheels. ***(THIS IS ONLY A BRIEF EXAMPLE)***



# Example of Benefits

- Examples of ways to confirm benefits information
  - Benefits Planning Query (BPQY) received through SSA Office
  - Confirmed through VR counselor (who may have the BQPY)
  - Confirmed through parents by SSA letter
- Please document information in Discovery profile.
- Example: SSI: \$414.00 Title II (CDB): \$400
  - Ann received \$414.00 of Supplemental Security Income
  - Ann received \$400 of a Title II Child Disability Benefits since her father is retired
  - Potential for PASS? Other benefits or work incentives?



# Discovery Activities

- 4-6 Discovery Activities – an array of skills and tasks should be captured (familiar and unfamiliar)
- Capture detail about what you learned from each. This is not an assessment or a measurement of skills.

# Discovery Activity Example

- Activity: Community Center making meals (familiar activity)
  - Ann jumped in to get started on preparing lunch for the community center. She greeted everyone in the kitchen by name and asked them about their week. She remembered details about each person's family asking how they were doing. Ann was asked to start peeling carrots. She washed her hands, grabbed her apron and the peeler and started peeling carrots. She peeled the carrots over a large container to catch the scraps of the carrots.
  - Supports Needed: Ann benefits from a few reminders to keep peeling the carrots. When she ran out she couldn't find the second bag and started looking around in her work space. Another volunteer noticed and pointed Ann to the refrigerator to find more. *(THIS IS ONLY A BRIEF EXAMPLE)*

# Informational Interview

- A minimum of 4 Informational Interviews to be completed (one for each emerging vocational theme)
- Reminders:
  - Vocational Themes are identified based on what is learned in the home visit, interviewing others and Discovery Activities.

# Informational Interview

- Ann: Vocational Theme; Culinary
- Skip's Restaurant:
  - Skip's is a family operated restaurant since 1981 in Kansas City. The restaurant is in a residential home that they renovated into a restaurant and comes with a cozy feel. It was initially renovated by Skip Bachman (original owner) into a lounge and then later into a full-service restaurant. The owner spoke about how Skip's has many loyal customers and it's about keeping that hometown and cozy feel with them. They like predictable. They talked about how they just lost one of their chef's and are looking for a new chef. Weekends are busiest and food prep often starts an hour or so before the shift begins.

*(Information was derived from Des Moines Register Datebook Diner, skipsdesmoines.com and fictional information).*

**(THIS IS ONLY A BRIEF EXAMPLE)**

# Vocational Profile

- It's robust
- Full of detail
- Qualitative
- Sets you up for job development
- Sufficient length



# Documentation Review

- Discovery is a qualitative and meaningful and drives where job development goes
- How we capture information and the words we use matter
- Be a story-teller, capturing who someone is...not what they are defined by
- Capture information in 4 ways:
  1. Optimistically
  2. Descriptively
  3. Non-Evaluative/comparative
  4. Sufficient length



# BREAK





# Customized Employment and Fidelity



# Ethics and Fidelity



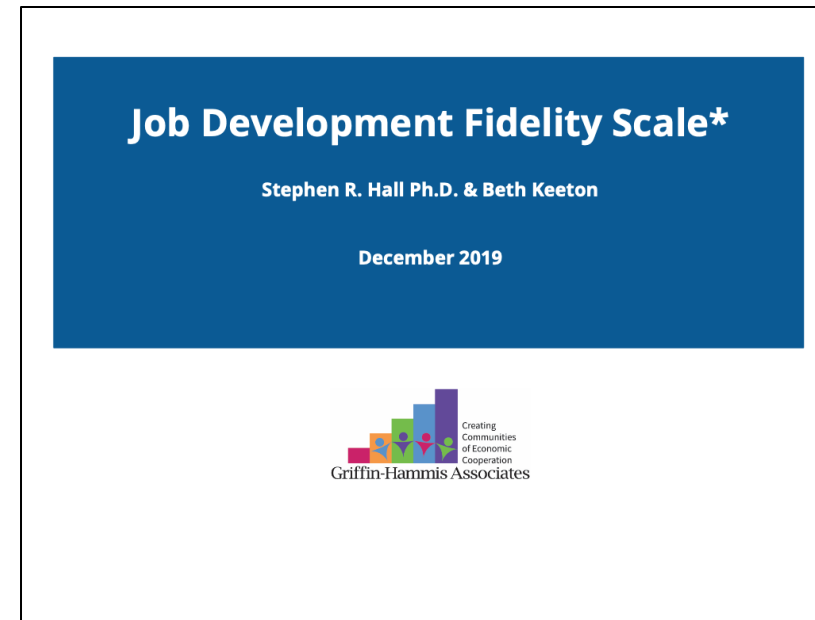
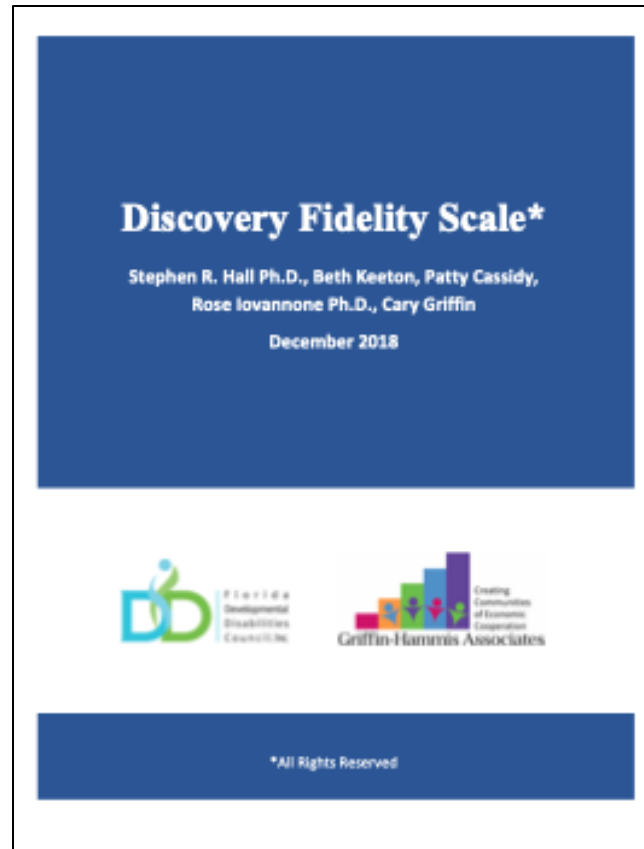
Ethics are your moral principles



Fidelity is how you choose to be faithful or uphold the moral principles you've committed to

# Fidelity Scale

1. Discovery Fidelity Scale
2. Job Development Fidelity Scale



# Common Misunderstandings that lead to Ethical Concerns

Straying from the model

Lack of training/tools support

Capacity



# Ethical Decision-Making Guide

## 1. Identify the ethical dilemma

- Reflect on your personal feelings about the dilemma
- What bias might you have?

## 2. Identify code of ethics or guiding principles of service delivery that applies

- APSE Ethical Guidelines
- CRCC Code of Ethics
- \* Discovery Fidelity Scale
- \* Job Development Fidelity Scale

## 3. Review ethical guiding principles to dilemma

- Consider how each principle may be supported or compromised

## 4. Envision a course of action to resolve dilemma

- Review positive and negative implication of potential decision
- Consult with supervisor (if not done already before action)



# CRC Ethical Principles

- Autonomy
- Beneficence
- Nonmaleficence
- Fidelity
- Justice
- Veracity

*The Professional Practice of Rehabilitation Counseling, Dennis R. Maki and Vilia M. Tarvydas, p. 354*



# APSE Ethical Guidelines

- Individuality
- Choice
- Respect
- Participation
- Competence
- Social Inclusion
- Community Settings with Minimal Intrusion
- Employment
- Career Planning
- Job Development
- Job Acquisition
- Work Support
- Life Support
- Career Advancement
- Staff Training

*APSE, 1992, updated 1998*



# Employment outcomes may be influenced by...

- Decisions rehabilitation professionals make about the perceived “employability” of persons with more significant disabilities
- Not being comfortable connecting with businesses based on personal bias or experience
- Carrying various responsibilities of an agency with minimal time to focus on individual employment services



# Straying from the model

- **Dilemma:** Using Discovery to say someone is un-employable or as a means to facility-based employment
- **Essential feature of Customized Job Development:** An employment seeker cannot “fail” Discovery
- **Ethical Guideline**
  - APSE: Career Planning – “Employment should be an option for any person interested in working, regardless of label, support need, or perceived functioning level.”
  - CRC: Justice: “Ensuring services are fully accessible to all – providing fair access to services, even difficult clients”



# Straying from the model

- **Dilemma:** Not offering Customized Employment 1 person at a time
- **Essential feature of Discovery:** The Employment Seeker is the leader of his or her own Discovery process
- **Ethical Guideline:**
  - APSE - Individuality – “People receive assistance as unique individuals with varying interests, preferences, and aptitudes. They should not be grouped together on the basis of label, functioning level, or convenience of support.”

*“Almost all codes of ethics in counseling make it clear that the client is the person to whom the first duty is owed...” – (Maki and Tarvydas, p.352)*



# Straying from the model

- **Dilemma:** Discovery taking 6+ months to a year
- **Essential Feature of Customized Employment:** Discovery takes 24-60 hours between 8-14 weeks
- **Ethical Guideline:**
  - CRC -
    - Fidelity: “to be faithful and to keep promises”
    - Justice: “Ensuring services are fully accessible to all – providing fair access to services, even difficult clients”

# Straying from the model

- **Dilemma:** Job Placement - relying on traditional placement strategies (food, filth, flowers)
- **Essential feature of Customized Job Development:**
  - Customized Job Development is different from finding jobs and filling employer vacancies
  - Each person is unique and has specific contributions of value in the labor market
- **Ethical Guideline:**

APSE - Job Development – “Jobs developed are reflective of personal interests, preferences and abilities, as well as employer needs.”



# Straying from the model

- **Dilemma:** Relying on pre-established community-based assessment sites vs. Discovery Activities
- **Essential feature of Customized Job Development:**
  - Discovery should never be used to determine which work experiences the employment
  - seeker should try out to become “more ready” for employment.
- **Ethical Guideline:**

APSE – Career Planning - “Job seekers, or at their invitation, family, friends, or co-workers, are the best source to personally convey information of their personal interests, preferences, skills, aptitudes, and life goals. These considerations are the basis for choices in employment opportunity, rather than program or agency considerations.



# Lack of Training/Tools/Supports

- **Dilemma:** Delivering Customized Employment without training and support
- **Essential feature of Customized Job Development:** Customized Employment Competency Model – 3 pages of Knowledge/Skills/Abilities needed for CE Delivery - <https://www.dol.gov/sites/dolgov/files/odep/pdf/2011cecm.pdf>
- **Ethical Guideline:** CRC – Nonmaleficence – “to do no harm to others – referring or not providing counseling services when not fully qualified”



# Systems and Capacity

- **Dilemma:** Funding mechanisms are not in alignment with evolution of best practice service development - can result in large case loads and turnover
- **Essential Feature of Customized Employment:** Discovery is accurately financed
- **Ethical Guideline:**
  - CRC – Nonmaleficence – “to do no harm to others – referring or not providing counseling services when not fully qualified”

# Systems and Capacity/Training

- **Dilemma:** Not capturing information on the Discovery Staging Record or Vocational Plan
- **Essential Feature of Customized Employment:** Discovery observation are always written objectively in descriptive sentences, reporting what is seen and heard in a positive manner
- **Ethical Guideline:**
  - CRC – Veracity: “ Describing completely who will have access to client files, detail and accuracy of documentation”



# What dilemmas are you experiencing?

1. Dilemma
2. Personal bias/experience/perception
3. Essential Feature of Customized Employment:
4. Ethical Guidelines that apply:
5. Positive or negative implication on guidelines
6. Potential resolution
7. Talk to someone else before implementing

“Our struggles are the short-term steps we must take on our way to long-term success”

“Working hard for something we don’t care about is called stress. Working hard for something we love is called passion.”

*Simon Sinek, Together is Better*



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