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## TX VRC Resource Tools

### 11. Defining Success

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The Business Plan has been approved! Now what? Critical next steps for the VR Counselor are to:

1. Amend the IPE, to include the addition of self-employment;
2. Authorize items and services needed to launch the business; and
3. Create a plan to monitor case closure (will be covered in the next tool).

Remember, when you completed the initial IPE, you entered a broad occupational goal without specifying it would be self-employment. Now that you have an approved Business Plan, adding self-employment to the IPE (checking the self-employment box) will clarify the employment goal, provide a basis for authorizing self-employment specific purchases, such as start-up equipment, and will more accurately reflect employment outcomes. Example of an Initial IPE and an Amended IPE is provided below.

#### Initial IPE Information:

**Employment Goal:**

Jewelry Repair and Design, full time.

**Objectives:**

Maintain physical and emotional stability

Obtain and Maintain employment

**Progress Review Criteria:**

Demonstrates new learning and applies to daily or work routines

**Customer Responsibilities:**

Apply for comparable services/benefits identified to assist reaching your goal

General-apply for any medical benefits you qualify for such as Medicaid, Medicare, SSDI or SSI

General-contact staff if any changes occur with your disability, medical/health, address, interest, living arrangements, phone #, income.

**Agency Responsibilities:**

Encourage and facilitate confidence building

Provide the necessary information to allow for informed choice.

**Comparable Benefits:**

Veteran Administration – Veteran Entrepreneur Program

Small Business Development Center

**Self-Employment:** No

**Occupational code and title:** 51-9071.00 Jewelers and Precious Stone and Metal Workers

**Participate in Counseling and Guidance with VRC every (days):** 30-60

**Maintain contact with VR Staff every (days):** 30-60

**Customer Pin:** XXXX

**Customer/Parent/Guardian/Representative Sign Date:** 09-13-2022

**CCS Sign Date:** 09-13-2022

## Amendment IPE after Business Plan Approval:

### **Employment Goal:**

Jewelry Repair and Design, full time.

### **Objectives:**

Maintain physical and emotional stability

Obtain and Maintain employment

### **Progress Review Criteria:**

Demonstrates new learning and applies to daily or work routines

### **Customer Responsibilities:**

Apply for comparable services/benefits identified to assist reaching your goal

General-apply for any medical benefits you qualify for such as Medicaid, Medicare, SSDI or SSI

General-contact staff if any changes occur with your disability, medical/health, address, interest, living arrangements, phone #, income.

### **Agency Responsibilities:**

Encourage and facilitate confidence building

Provide the necessary information to allow for informed choice.

### **Comparable Benefits:**

Veteran Administration – Veteran Entrepreneur Program

Small Business Development Center

**Self-Employment:** Yes

**Occupational code and title:** 51-9071.00 Jewelers and Precious Stone and Metal Workers

**Participate in Counseling and Guidance with VRC every (days):** 30-60

**Maintain contact with VR Staff every (days):** 30-60

**Customer Pin:** XXXX

**Customer/Parent/Guardian/Representative Sign Date:** 09-13-2022

**CCS Sign Date:** 09-13-2022

Note the highlighted sections in the IPE examples above.

### Plan Services (Amended IPE after Business Plan Approval)

Description	Plan Service Category	Vendor Name	Payment Method	Start Date	End Date	Previous Plan Service
Customer will be provided with counseling and guidance to assist customer throughout the VRC process and to provide him with the necessary information to make informed choices and obtain/maintain employment. VRC will monitor customer's case progress.	Counseling and Guidance	TWC-VRS	Provided	09-13-2022	09-13-2023	No
Customer will meet with assigned VA counselor to assist with comparable benefit for entrepreneur program, business plan assistance.	Other	Veteran Administration – Veteran Entrepreneur Program	Arranged	09-13-2022	09-13-2023	No
Customer will meet with the local SBDC office to discuss any self-employment plan options, and courses to help start potential business.	Other	Small Business Development Center	Arranged	09-13-2022	09-13-2023	No
Jewelry CAD Dream (Computer Aided Design), 3D Printer Tiger XL Plus, Thea Render Software, Bullet Boolean Software, \$480 toward 1 year access of the premade Jewelry CAD website (Virtual Inventory Website with a large source of jewelry designs, renderings, and animation)	Other	Jewelry CAD CAM Masters LLC	Purchased and Arranged	02-24-2023	02-28-2024	No
Basic training lessons no charge for 1 year, 50 complimentary CAD jewelry designs and files added to the 3D Printer, discount of \$720 off the 1 year access for Virtual Inventory Website, \$1000 discount off list price of Jewelry CAD Dream.	Training	Jewelry CAD CAM Masters, LLC	Purchased and Arranged	02-24-2023	02-28-2024	No
VR services for ongoing medical stability, medication management, additional services not covered by TWC-VR.	Treatment	VA Clinic	Arranged	02-24-2023	02-28-2024	No

## Stability Measures:

When amending the IPE, the VRC and customer must agree to business stability measures, such as when the business revenue:

- equals or exceeds operating costs, as shown on a financial statement, and provides minimum wage for the business owner; or
- yields an income that is comparable to the income received by other individuals who are not individuals with disabilities and who are self-employed in similar occupations or on similar tasks and who have similar training, experience, and skills. (VRSM C-1103-6)

This is also a time for VR Counselors to review with their customers what they will need to document a successful closure, including documents demonstrating that the business has been in operation for at least 90 days and that the stability measures have been met.

These might include:

- a Profit & Loss Statement (VR1806 Self-Employment Financial Actual Spreadsheet),
- a Cash Flow statement, or
- business bank statements.

VR counselors sometimes find it difficult to get customers who are self-employed to share their business financial information. VRCs should set the expectation with customers of TWC-VR's requirement to release and disclose business financial information with TWC-VR at the beginning stages of their case if the customer intends to request TWC-VR support.

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The VRC and customer must agree to business stability measures.

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Note that for Supported Self-Employment, additional stability measures are outlined in the Standards for Providers Manual.