



Customized Employment Replication Guide



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The Project

Easterseals, in collaboration with Griffin-Hammis Associates, Westside Regional Center, Progressive Employment Concepts, Inland Regional Center, and the California Department of Rehabilitation conducted the nation's first field test of the Discovery Fidelity Scale¹, funded by the California State Council on Developmental Disabilities. Also incorporated into this yearlong project were Association of Community Rehabilitation Educators (ACRE) certificate courses in Community Employment with a focus on Customized Employment, the creation of a Community of Practice, and technical assistance in implementing Customized Employment, organizational change, systems wide partnerships, staff development, employer engagement, and best practices, reaching over 80 different agencies in six counties.

The ensuing pages include lessons learned surrounding the implementation of Customized Employment from this project, as well as expert advice from across the nation, and direct experience of the author. Where possible, sample documents have been provided and links for websites with additional information included.

Trainers and Subject Matter Experts vary in their approach to Customized Employment and what each element of successful Discovery entails, however it is undisputed that Customized Employment is the best way to support people with significant disabilities, and that Discovery always guides the process. For the purposes of this replication guide, the tools and principles prescribed by Griffin-Hammis and Associates are those referenced.

¹ http://www.griffinhammis.com/images/DFS_March_2018_Updated3-5.pdf Accessed 02.13.2020

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The Commitment

Thinking about employment can be summarized as –

— *from impossible to possible*

— *from possible to beneficial*

— *from beneficial to allowed*

— *from allowed to preferred*

— *from preferred to expected*

— *from expected to required*

..... *To the same standard as everyone else.*

Dr. David Mank

When considering any new line of business, or expansion, it is critical to determine community need, existing services offered, availability of staffing, funding, community partnerships and best practices in the field. This holds true when entering the arena of Customized Employment. This research should be conducted prior to beginning the vendorization or funding process and can be accomplished over time, by speaking with family groups, job seekers, educators, local funding agencies, community groups, and other non-profits.

For agencies supporting people with intellectual and/or developmental disabilities, or those considering doing so, substantial focus must be given to philosophies, ideals, and beliefs (*Provider Transformation Manual*).² If agency leadership is not entirely in support of full inclusion for people with disabilities, is lacking commitment to end segregation or help move people out of poverty, or feels anything but certainty that through creativity Customized Employment can work for everyone, there is no need to continue reading.

² <http://drivedisabilityemployment.org/employment-first-resources/provider-transformation-manual-%E2%80%93-pilot-version-and-webinar-series-1.0> Accessed 02.13.2020

History of Customized Employment

1. ODEP (Office of Disability Employment Policy) first recognized Customized Employment in 2001
2. The Journal on Vocational Rehabilitation released *A Revolution in the Employment Process of People with Disabilities: Customized Employment a Catalyst for System Change*³ in 2008
3. CMS (Centers for Medicare and Medicaid) recognized CE in 2011
4. RSA (Rehabilitation Services Administration) recognized it in 2013
5. President Obama signed the (WIOA) Workforce Innovation and Opportunity Act into law in 2014
6. Bi-partisan support to end 14c (sub-minimum wage) in 2016
7. States are continuing to pass executive orders and legislation making employment for people with disabilities a priority
8. Parents are demanding employment for their sons and daughters
9. Self-Advocates are fighting discriminatory practices – and winning

Definition – According to the Department of Labor

“Customized Employment is a flexible process designed to personalize the employment relationship between a job candidate or employee and an employer in a way that meets the needs of both. It is based on identifying the strengths, conditions, and interests of a job candidate or employee through a process of discovery. Customized Employment also identifies the business needs of an employer. Together, these create a match resulting in a customized position.”⁴

...one person at a time . . . one employer at a time...

Customized Employment will often take the form of:

Task reassignment: Some of the job tasks of incumbent workers are reassigned to a new employee. This reassignment allows the incumbent worker to focus on the critical functions of his/her job (i.e., primary job responsibilities) and complete more of the central work of the job. Task reassignment typically takes

³ <https://content.iospress.com/articles/journal-of-vocational-rehabilitation/jvr00417> Accessed 02.13.2020

⁴ <https://www.dol.gov/odep/topics/CustomizedEmployment.htm> Accessed 02.13.2020

the form of job creation, whereby a new job description is negotiated based on current, unmet workplace needs.

Job carving: An existing job description is modified – containing one or more, but not all, of the tasks from the original job description. (Note: unlike traditional job carving, which often takes tasks an individual cannot do off an existing job description, in Customized Employment, job carving is used to select tasks that the job seeker excels at and crafts a new job.)

Job sharing: Two or more people share the tasks and responsibilities of a job based on each other's strengths.

Business creation: although becoming more established throughout the country — is self-employment as a form of Customized Employment. Self-employment allows for an individual to receive assistance in the creation of an independently owned small business (typically a micro enterprise, under five employees) based on the strengths and dreams of an individual and the unmet needs of a local market while incorporating the individualized planning and support strategies needed for success.⁵

Key Concepts of Customized Employment

Competence is presumed – don't "assume" someone can't do something simply because they have a label.

Work adds value to every aspect of life – it improves overall quality of life, increases or enhances relationships, improves health, and supports our economy.

Everyone who wants to work is ready – there is no "test" to determine who is ready to work or who will be successful at work. In Customized Employment it is up to the provider (Job Developer or employment staff) to match the job seeker's skills, talents, and interests, with an employer who needs and values those things and offers a culture that supports the individual as they are.

Everyone has something to contribute – be it a large group of friends with common interests (aka. potential customers), an extraordinary attention to detail,

⁵ http://www.griffinhammis.com/images/DFS_March_2018_Updated3-5.pdf Accessed 02.13.2020

an encyclopedic knowledge of some obscure process or fact, a specific talent, or an engaging personality.

There are millions of ways to make a living – not everyone starts out in a fast food job, and not everyone is cut out to work in an office. More than 150 Million Americans work,⁶ of course not all are successful, but the fact remains that the majority of those employees did not need to “prove” they could work before landing their job.

Everyone communicates differently – some people speak English or another language, some use American Sign Language, and some do not have speech, so they use their actions or assistive technology to communicate. What many people consider “behaviors” are actually a means of communication and like all communication it varies depending upon whether the person is in a setting in which they are content, or somewhere that makes them tense or uncomfortable. This is what makes the culture of the employer so vitally important.

Everyone can work – **Zero Exclusion**
Everyone is ready now – **Ideal Conditions**
Everyone has the right to work – **Self-Sufficiency**
Everyone has skills & assets – **Discovering Personal Genius**
Everyone can contribute – **Economic Development**
Everyone is connected – **Social Capital**
Everyone means Everyone

Customized vs. Supported Employment

People may argue that Customized Employment is just a new buzz word, or the latest “phase”, or even that Supported Employment (SE) has been customized all along. While individualization was the intent when Supported Employment was started more than 30 years ago, it has not been consistently applied and Supported Employment has become more of a “place and train” model where a

⁶ <http://www.pewresearch.org/fact-tank/2016/09/01/8-facts-about-american-workers/> Accessed 02.13.2020

person is placed into a job and then trained (through on-the-job coaching) for as long as necessary.

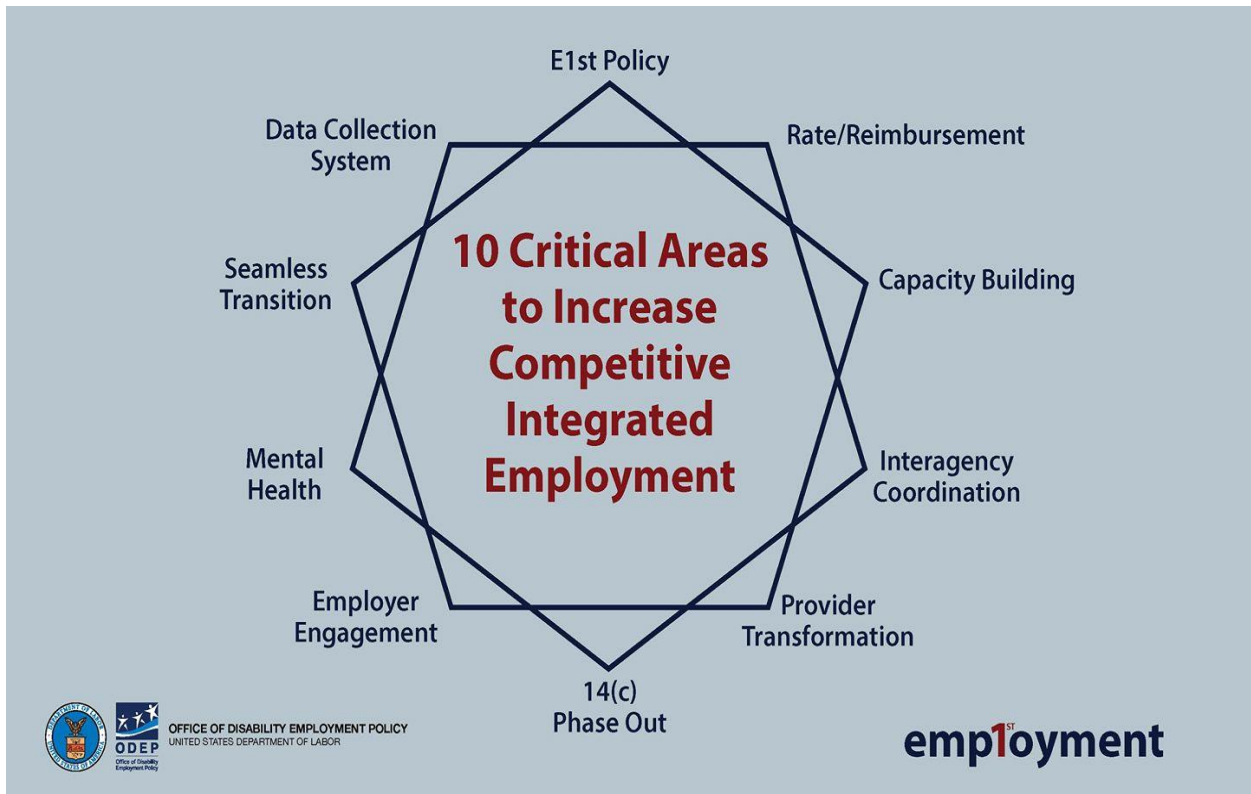
Customized Employment focuses on the individual first through the process of Discovery; getting to know his or her community, routines, hobbies, talents and interests; recognizing times when support is needed and when individuals are at their best. Discovery uncovers the job seeker's knowledge, skills, abilities, contributions and conditions of employment based on the employment staff's observations and interactions and looks for themes that apply in a person's life (i.e. do their favorite things all revolve around computers, or books?). Those themes are then verified in places the person is familiar with and in places that are new. Informational interviews are held with employers to learn about particular businesses of interest but also learn about work culture, build social capital, and find the jobs 'behind the door'. Paid work trials are also used during Discovery so job seekers can see what it is really like to do the job, or task, they are considering. Each of these steps helps build a vocational profile which enables the employment staff to connect the job seeker and employer for a great match. Also, in contrast with Supported Employment, Customized Employment relies upon the natural trainers at the job site (i.e. co-workers and supervisors), and provides limited, specific, coaching via Systematic Instruction. An excellent guide to these concepts and more can be found in the Job Developer's Handbook.⁷

Timing – The Time Is Right

Never in our history have we had so many advocates, systems, processes, and philosophies, coming together to make Competitive Integrated Employment a reality. Additionally, data driven research demonstrating the effectiveness of the Customized Employment model, will soon replace the anecdotal success stories of the past.

⁷ <https://products.brookespublishing.com/The-Job-Developers-Handbook-P289.aspx> Accessed 02.13.2020

The following infographic titled “10 Critical Areas to Increase Competitive Integrated Employment”, published by the Office on Disability Employment Policy, points out how each piece of our system is changing in support of the principles of Employment First. Specifically: Employment First policies or legislation now exist in more than 30 states, including commitments to improve rates for providers so they can hire and train top notch staff, capacity building so agencies are learning best practices, interagency coordination and collaboration, provider transformation from segregated to integrated models, the 14c phase out eliminating sub-minimum wage, increased employer engagement, renewed focus on mental health, creating seamless transitions from school to work, and improving data collection systems so that outcomes can be better tracked.



Creating a Customized Employment Business Model

All good business plans, especially those for Customized Employment are based on research, data, and proper planning.

Do **market research**.

- Is there a need?
- Who are the competitors?
- What is the availability of staff?
- What is the local cost of living?
- Who are the biggest local employers (you'll be competing for staff)?
- What is the predominant culture?
- Is there strong support from Department of Rehabilitation, and/or the Regional Center?
- Do the local schools have solid transition programs?
- What do self-advocates want?
- What do families want?
- What supports are already available?

Once you have answered these questions, you will have the foundational information needed to move forward.

Review your financial and human **capital**.

- Do you have enough money, resources, networks, and/or natural supports to do adequate market research and eventually provide a service model that will not cover its costs for a year or more as you get set up? If not, what is your plan for supplemental funding?

Design your **start up team**.

- This may or may not be the team that will eventually run the service. This will be the visionary team who can take the information already gathered and make a determination about the best timing and approach. This team should have the support of local employers, community leaders, advocates and self-advocates, and be comprised of people with business acumen as well as those who provide hands on support to people with disabilities.

Develop your **staffing model**.

- In Customized Employment services are provided 1:1.
- How many staff will you need to start?
- How many staff will you need to ensure services aren't interrupted if someone is out sick, or quits unexpectedly?
- Will your job developer also be the person doing Discovery and providing initial supports on the job?
- What level of management is needed?
- How many job seekers can one staff support?
- What training is needed to ensure quality services?

Determine your **funding model**.

- Will you use a combination of private and public funds?
- Do you have established relationships with local funders?
- Are you already a vendor of Department of Rehabilitation or a Regional Center?
- Do you currently possess CARF (Commission on Accreditation of Rehabilitation Facilities) accreditation?
- How will you determine your actual costs? (See DDS rate setting and vendorization guidelines⁸).

Establish your **marketing plan**.

- What sets you apart from others doing the same work?
- What catchment area will you serve?
- How will you differentiate your services?
- Will you have a specific area of expertise (i.e. Customized Employment for transition aged youth, or moving people out of sheltered workshops)?

Answers to these questions will help you estimate timelines.

Each of the pieces above are critical to success, and each will build upon the other. In some cases, it can take up to a year to truly understand a community's needs. It also takes time to establish yourself/company as reliable and to build those critical relationships.

⁸ <https://www.dds.ca.gov/rc/vendor-provider/vendorization-process/> Accessed 02.13.2020

Funding Streams

If you will be seeking vendorization through the Regional Center system, this can take a year or more, as there is currently no common service code or standardized design for Customized Employment. This does not mean that you need to wait a year or more to start providing services. You can access other funds to support your movement toward Competitive Integrated Employment while your Customized Employment vendorization is in progress. For example, if you are not already vendored for Supported Employment, you may wish to do this – it can be a valued opportunity for individuals with less significant support needs, or those who already know what type of job they want. The rate for Supported Employment is typically less, but it gets you started with both the Regional Center and Department of Rehabilitation. The certification and vendorization process for Supported Employment is typically much shorter than that for Customized Employment, if you understand the regulations and have processes in place to meet them. You can also access funding for Tailored Day Services – this too is designed to help people enter the world of work, or higher education so the Customized strategies apply here as well. (Note: Setting up these funding models while preparing for Customized Employment may help advance people into Competitive Integrated Employment, however, it is not a Customized Employment model and does not follow the nationally recognized best-practices.)

Currently, the standardized design for Customized Employment is jointly funded by Regional Centers and California Department of Rehabilitation based on an agreed-upon service description. There are four modules⁹ based on the nationally recognized Customized Employment service description: namely (1) Discovery; (2) Planning for Customized Employment; (3) Business Negotiation & Job Site Analysis; and (4) Systematic Instruction & Ongoing Support. Regional Centers fund the first two modules while Department of Rehabilitation covers the last two modules.

⁹ Customized Employment Competency Model, <https://www.dol.gov/odep/pdf/2011cecm.pdf>
Accessed 02.19.2020

Some Regional Centers offer start-up funds to keep people from entering, or for people moving out of, the Developmental Centers. If your agency has a high level of expertise, you may be able to apply for these funds as another funding option (which are often referred to as Community Placement Plan (CPP) Funds).

Self-Determination is also an option for funding. In this model, the individual client is in charge of his or her own budget and can hire services to meet their specific needs.

On occasion, families may want to fund their son or daughter's service privately. This is also a funding stream you can consider, although it is important to recognize that per California Code of Regulations Title 17, you cannot charge anyone more or less than the fee you have established for the Regional Center.

People who receive Social Security (SSI or SSDI) benefits, may want to speak with a Work Incentives Benefits Planner (WIPA) to determine if they can use their Social Security benefits to fund Customized Employment.¹⁰

Major Considerations

1. When designing Customized Employment Supports it is essential to speak with other providers, Subject Matter Experts, and others in the field who have done the work. Not only can you gain invaluable knowledge into what has worked and what has failed, but you will learn about opportunities for collaboration, training, and professional development.
2. Hiring processes for Customized Employment are also different than those for site-based, or medical-based, models. Instead of hiring people who have a helping nature, the focus needs to be on creativity, initiative, business acumen, social capital, and flexibility; successful caregivers often fail when moved into Customized Employment positions as they are not comfortable in these areas.

¹⁰ <https://choosework.ssa.gov/findhelp/> and <https://www.disabilityrightsca.org/publications/work-incentives-planning-assistance-wipa> Accessed 02.13.2020

3. Investing in staff is key to a successful Customized Employment service. To begin with, staff should attend a forty-hour introductory course titled Community Employment with emphasis on Customized Employment (this is a nationally recognized certificate course accredited by the Association on Community Rehabilitation Educators, or ACRE). Not only are there the upfront costs of ACRE certificate courses for each staff, but there is ongoing technical assistance needed as people explore each stage of Discovery and enter into new phases of Customized Employment. Adequate, consistent training adds significant time to the hiring and onboarding process, and a staff cannot be expected to produce outcomes for roughly 90 days. Also, due to the intensity of the Discovery and Customized Employment process, caseload sizes are much smaller than many agencies currently support (e.g. 4-6 versus 40-60). These costs, as well as the indirect staff time needed to attend these courses, increase expenses and must be calculated into the established rate.

While ACRE courses are an excellent introduction to Customized Employment, they are not designed to be a standalone. Several agencies have had significant challenges because they were viewing the forty-hour ACRE course as all their staff needed to successfully provide Customized Employment. This is simply not the case; unless there is ongoing technical assistance built into your budget, along with supportive supervision, staff will struggle, and job seekers will remain unemployed, resulting in dissatisfaction and lost revenue.

4. Proper planning and preparation cannot be stressed enough. High turnover, poor results, unsuccessful job matches, and long waiting lists all send strong messages to the community about your agency's commitment to employment for all. Similarly, when people fail at a job due to a poor job match, stereotypes such as "people with disabilities cannot work" are perpetuated in the minds of community members.
5. Another significant factor to consider is that all Customized Employment services are provided off-site. This decreases fixed costs by eliminating expenses surrounding bricks and mortar buildings, yet increases risk management considerations, and adds expenses related to local travel. Of course, it also presents challenges in supervision of remote staff.

6. Complete, comprehensive, documentation of activities is crucial. Not only for funding, but for continuity should a staff leave, and for ensuring the most complete vocational profile possible. One of the best tools around is the Discovering Personal Genius staging record.¹¹

Evaluation

Evaluation and oversight need to be incorporated into every aspect of Customized Employment. This includes not only the mandatory evaluations for health and safety, annual staff performance evaluations, or fiscal compliance required by the Regional Centers, Department of Rehabilitation, and CARF, but also routine monthly feedback loops related to number of business contacts, informational interviews, discovery visits, neighborhood mapping, and meetings of the Discovery team. It is these key indicators that determine the success of the individual employment staff and can flag a supervisor when things are getting off track. A formal monthly planning, goal setting, and review is strongly recommended.

Summary

In our society people are valued, and assigned social status, by the work they do. When we do our best to ensure the best possible job match for our staff and the job seekers we support, the community not only benefits, but thrives.

¹¹ https://ohioemploymentfirst.org/up_doc/Session_9_Customized_Employment_and_Discovery.pdf Accessed 02.13.2020

Resources

<http://www.apse.org>

<https://www.chhs.ca.gov/home/cie/>

<https://www.dds.ca.gov/initiatives/cie/>

<https://www.dol.gov/odep/>

<https://www.dor.ca.gov/>

<https://www.dor.ca.gov/Home/CieBlueprintforChange>

<https://www.griffinhammis.com>

<http://www.leadcenter.org/employment>

<https://scdd.ca.gov/>

https://scdd.ca.gov/Employment_First_Committee/

<https://tash.org/advocacy-issues/employment/>