



TECHNICAL ASSISTANCE and CONTINUING EDUCATION TACE CENTER: REGION IV

*A Project of the Burton Blatt Institute at Syracuse University
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PLANNING FOR CUSTOMIZED OUTCOMES/ RELATIONSHIP TO THE IPE

Event Date: December 07, 2009 (original date November 18, 2009)

Presenter: Norciva Shumpert, Marc Gold & Associates

Facilitator: Steffany Stevens

Overview

Steffany Stevens: Good afternoon, and good morning everyone. Thank you for participating in the Webinar series on Customized Employment. Today is a re-do from November 18th Webinar and we have Norciva back, who will do the Webinar for us. I want to mention a couple of things. It is fully accessible, regardless of the disability or assistive technology that might be used. This makes it possible to conduct workshops over the Internet with just about any connection. Note if you use the phone line bridge long distance charges may apply. There are unfortunately some computer issues you reported to us that are inherent to your system and beyond our control. That is why it is important to check your system prior to the session. We are available, staff at TACE, upon requests to work with you in advance of the session. I do want to make sure I stress the word advanced, because right before the session we are unable to troubleshoot technical issues at that point.

So, without further ado I will like to introduce you to Norciva. Norciva's a private consultant working with Mark Gold and Associates, Employment for All, a nonprofit organization committed to employment for all persons. She's been working as a consultant since 1993, in various states with organizations, families, state entities regarding employment, for persons with significant disabilities, transitions, self-employment, community life opportunities, system organization, IDA's and self-directed services. She's worked with several national state initiatives with the Department of Labor Social Security Administration and state and local provider agencies to redesign services to support blended resources and funding to implement customized employment and self employment services and increase self-determination in the usage of generic systems for all persons. Without further ado, I will go ahead and hand the microphone over to Norciva. Norciva, you can go ahead and begin. Thank you.

Slide 1: Planning for Customized Outcomes / Relationship to the IPE

Norciva: Welcome, everyone. I am glad to see many of you are back today, and that we have a large group on. There are 56 of us joining today. I hope you all can hear me. Today's Webinar is about planning for customized employment outcomes and the relationship to IPE performance. It is the third webinar in a series of four on customized

employment. We will be doing a fourth Webinar later in either December or January. Steffany will update us on those things.

Slide 2: Effective Planning Starts with Discovery

Discovery provides, in a non-traditional, common-sense form, the information needed to determine *the strengths, needs, and interests* of any person with complex life issues and significant disabilities.

The effective way to actually begin the plan is to have done some discovery. I am on slide two. In starting with discovery, you really get a chance to look at who the person is. One of the more critical things we have found through our many experiences, and also in listening to folks like you, many times people come to the table and just ask for something. Sometimes those things have not been thought through, you don't have a sense of who that person is. Discovery needs to be done before planning. If you are going to customize employment, discovery is the first thing, it's a non-traditional common sense form that creates a picture of who that person is. Notice on this slide I talk about the complex life issues. Oftentimes it's not just the disability that has an impact on a person's life. It's the complexity, who they are, where they live, their transportation, many of the things that you might see.

Slide 3: Discovery is...

Let's move to slide number three. What is discovery? And I did a Webinar in November, perhaps October on discovery. I understand it's on the website tacesoutheast.org. You can go back to that and have an opportunity to listen to that and compare it to the information. Understand that this is not a presentation on discovery, but I have to start with discovery, because to me it is the foundation of planning. What is discovery? It's a process that gets to know who the job-seeker is from an employment perspective. It is about spending time with the job seeker, instead of testing them. Many of you, as a counselor, you won't be doing these things; you would probably refer out to someone to do discovery. You might be a contributor of discovery because you may have worked with this particular customer for a good period of time and may have information to give to the person that is doing discovery on that job seeker.

For us, discovery really allows us to look at who the job seeker is, define the best of that job seeker, it's a very capacity-driven approach, very common sense approach. It looks at the person and begins to talk about the impact of disability on that person, as opposed to label. I can remember when I first started working with cerebral palsy at the national office in D.C. One of my first anxieties was what is cerebral palsy? Every time I worked with one with someone with cerebral palsy, it looked different. You have to understand almost every disability is like that. The labels that a person may have, may it be autism, cognitive-type disability, maybe it's a brain injury. Each of those things have the same label, multiple people may have a brain injury, but how that impacts that

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person and the way they communicate, and the way in which they get along with others is going to be different, and that's the what discovery does. That gives us the real sense of who that person is.

Slide 4: Discovery is (cont.)

Moving to slide four, you will see that not only is it a way to get to know the person, how their complexities impact who they get along with, but if you look at this slide, the first bullet talks about what are the unique contributions that are offered by those. We have to really think about that. There's a lot of ways to look at contributions. You will hear me describe what a contribution is later on. A contribution is a way to think about the person in relationship to an employer. What does this individual, this job seeker, have to offer an employer? Think from that perspective; contribution. Discovery looks at that. What does this person have to offer an employer?

It also helps us get a chance to look at settings where they are most who they are. Now, think about that for a minute. You want to think about the environment. You want to think about the people that they are with when they are most who they are and at their best. You think about employment, when someone is at their best. Many times we match people to jobs based on what we are interested in. You are interested in computers here is a computer job. Many people lose their jobs due to the settings they are working in, be it very noisy, crowded, versus a setting where it is very quiet. This is what discovery does. It really allows us to look at this comprehensive picture of who the person is, and think about these critical components that lead to success.

Discovery is also not the plan. Discovery is the foundation that tells us who the person is. So you have to do this before you plan with someone, if you are going to be very effective. Discovery is compatible with self determination, customer choice. In fact to me, it empowers people with information you learn about them through discovery. For instance I might have spent time with someone and realize that when you are working with people there appears to be a flow, you empower a person with that. When you are with two or three people, someone is offering direction, information. Someone else is offering support. This works better than working on an individual basis, by yourself. Having someone understand where they are at their best is very consistent with self-determination, customer choice, instead of asking people where are you at your best? Discovery lends itself to identifying that information and empowering the person. This is what our picture is, is this consistent? That becomes a tool to move forward.

Slide 5: The Iceberg Analogy of Discovery

When I move to slide five, it really is just a simple analogy for you to think about during discovery. Many of you as counselors and I am sure many of you are, you have a snippet, a snapshot of a person, if you would. Many times that snapshot, if you have a long-term relationship with them, pretty much represents the iceberg analogy, to where you not only see the information at the top of the iceberg that people usually show

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others, but you perhaps have worked with that, individual for a longer period of time and you have some knowledge base around the employment history, you understand some of their complexity, to the degree. And that's what we really feel like discovery has to take a look, at both the initial picture of who the person is, and then that comprehensive, more in-depth kind of picture. For us, discovery typically can not be seen in a very short snippet of time. It cannot be gathered just by asking questions. It has to have a combination of strategies to kind of do a check and balance, if you would. For instance, one of the very powerful things about discovery is that someone might say, I love to do this. Later on, while doing discovery, you go, you know you said you loved to go about doing this but this does not seem like you like it at all. For instance if this were about me, I might say I love canoeing, but you ask when the last time I went canoeing it was 10 years ago. It's not a picture of who I am today. That's what discovery really has to get to, with each of your customers.

Slide 6: Discovery & Planning

Slide number six, we are going to see discovery and planning really are hand in hand together. In fact, we're very strong advocates of saying please don't do discovery and just write up who this person is. You really need to use that information. So discovery and planning go hand in hand. The who is this person that builds upon strength, looks at me and looks at interests, a really different way of thinking about a job. Strength-based planning says if I am really good in this area, work well with these kind of people, you put those pieces together to do strength based planning, and that's the combination of discovery, of who I am. And the planning is the strategy I will talk about today that pairs these two pieces.

Slide 7: Disclosure

Moving to slide seven; one of the interesting things about discovery is that you have to think about disclosure. Disclosure is never the bare facts or just the facts, please, it's the combination of understanding the person's complexities on their potential employment. Having the picture of who the person is, understanding in customizing employment we might have to negotiate with an employer in order to actually customize a job. So what you would see is that we would have to customize this job, I may have to go negotiate with an employer. In negotiation I might have to do some disclosure. I want to give you an example. One thing I might need to do in a negotiation with an employer is to negotiate with him not to fire the person if they quit the job. So it might be part of my disclosure -- you know one of the ways Mr. Henry here deals with his frustration is that his immediate reaction is to quit. Then, after a little bit of reflection he realizes that what he needed really was not to quit, he needed time out, a day or so of cooling off period so he could go back to work. One of the things that disclosure does, would never come in, say he's frustrated, does this. It allows us to look at who people really are, and when you customize a job you actually go in, talk about how this person needs this kind of support.

Slide 8: Disclosure and Planning

Moving to slide eight; Disclosure and Planning. Discovery is captured in a profile. The profile is a very intimate document. In fact, what you will find, during the planning you may have multiple pieces, multiple profiles, one that the person that wrote the profile actually put together and they show that to the job seeker and the job seeker says yes, this is me. Then there's some sensitive information in there. You choose the distribution to share the profile to others that might come to the planning. You may choose to have a different kind of profile, what I call a distribution profile that does not have all the detailed intimate documents in it. For instance, there may be a church minister coming to the planning meeting so they can open some doors for you. The next thing you might want to think about, that's going to be a big piece they would have to offer, so you would not have the minister see the profile with some of the more details about the individual. Some of the things we may choose to pull out. There's a direct relationship between the discovery, who is this person and the people who will come help plan. So there is this shared vision. But there will be a version for one group of people to see, and the job developer, of course would see a version of the discovery that is unabridged, if you would.

The other thing you have to think about is that during disclosure and planning there be agency policies around sharing a profile. The profile is a positive piece of paper that defines who this person is today. With that, in mind, it gives us a picture of the job seeker at their best. So this is going to be needed to be shared. There is some sense of disclosure as you begin to put this altogether here. The combination, looking at who the person is, thinking in terms of who the planning piece may be now are two different things.

Slide 9: When is the Discovery Complete?

If you move to slide nine, when is discovery complete? We typically recommend that you finish discovery in at least the four to six-week period, if you can finish less than that, three weeks, that's really nice. But when you finish it, it has to go before the job seeker. If there's family members involved, you take it to them. The profile developer brings it to them. That's where you have a discussion about is this an accurate picture of me. Many times I have done a plan and had to ask the staff what it is that -- how they got to the discovery part, how they got the approval of the profile. They will have gone, "well, I didn't do that, I didn't get that approval". I am like, well, guess what? If this is not a comprehensive, approved picture of the job seeker, we may not be planning with all the facts. So one of the more critical pieces to me, when we finish discovery and develop a profile, we take it to the job seeker and family members they think are important, and go over it with them, make sure we have all the information necessary to plan. I have to tell you, I have been doing this quite a long time and even for me, I have to sit back, really look at the profile, think in terms of do I have all the information here before I can go to the next step? Do I have the correct information? If I do, then I am

better able to move forward here. So, it's understanding there's roles in doing this, making sure you have all the players together and certainly the right information.

Slide 10: The Profile is shared with all participants of the Customized Plan

The profile is then shared, in slide ten, with everyone that is coming to the planning meeting. It's really critical that everybody have it ahead of time so they can get to know who the best of the person is, because it's likely, if you are sending this to, let's say, a former counselor that worked with this job seeker, another member of the family, say it's a transition team for a student, you have a teacher involved in your planning here. One of the things you would want to make sure, that everyone sees, has a chance to see the best of the job seeker and that they have a chance to see everybody else's perspective of that job seeker. So when you come to the table with the plan, you are all planning based on who that person is, not their picture of that person.

Slide 11: Like Planning for a Custom Home

So, slide eleven, Planning for a Custom Home. I love this slide because it really helps us think about this. You guys do this so much, so often, that it we take for granted the individualized need of each person. You have to do it so often, you almost have a chance to immune yourself to the individuality. That's what this slide helps us think about. If I were to build a custom home, I would have to think about how tall is this person, how tall should the counters be? How many doors do they need? Do they need to be steps? Is this person going to be going up and down stairs? What's the amount of money the person has to build the home? When custom design a home, it is one of the few situation where you actually pull together the architect and builder together. They sit in, talk about it, with the homeowner. That's exactly the process we recommend for developing a customized job. Whoever is going to do the job development needs to be at the table, a part of this planning process.

The actual person that put together the profile that says here is the person that we need to build this job around, goes to people and says you need to come to the table. Would you do this for everybody? Absolutely not. A customized employment planning process is going to be for someone that you have really targeted and you are overtly trying to do a customized employment job for. There are real important characteristics you can carry over to your other planning processes, to your required plan, so it all works together, but would you do it in total like this for every person? No. But you would use bit and pieces of this for some of your customers. You would actually have to design their employment more strategically if you want an outcome. For a person you are looking for a customized job for, who you might want to customize employment for, probably going to be a person that has a lot of complexities in life, you don't see them competing, filling out job applications. This will be for a someone that you are actually going to talk to an employer about, to represent them, to develop a job. Tat's one kinds of person. Now let me give you another kind of person. How many of you have folks out there, answer by

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yes on the Webinar -- how many of you have people you represent that get jobs, and quit them shortly after because they don't fit? Say yes on your machines we are beginning to see some yeses here. This process really works for them. A few are saying no. The majority are saying yes. Some folks you really have to recognize, when they come back through your services a couple times and you go wait a minute we have done this before, that should be kind of a red flag to you, say I need to do something different. So, you are not thinking about a customized employment process, the detailed way of a custom home for all people, you are going to really think about which of your customers need a more intensive focus, and which will need a different strategy in getting this. Those that really need that intensive focus, you are going to think about this from their perspective, so you can start this, and be able to see how this works for them. Now, let's move to the next slide.

Slide 12: Employment Planning

Slide number twelve, The Employment Planning. This is really is going to be the piece that develops the direction for all the job development efforts. Now, think about it. There will be some folks you really need to help them plan, and they can go do their own job development. There will be some folks that you will actually help them do their plan, you will help them also do job development, or refer them to CRP to do some of the job development. Either way, understand that this has a significant role, powerful tool in the process. Number one, the planning needs to occur in a meeting format. It does not necessarily need to be you and the job seeker. It needs to be held after discovery, and it needs to be when you are thinking about really seeking direction for employment, and also customizing that negotiation with an employer.

Slide 13: The Customized Planning Meeting

Looking at slide thirteen, the Customized Planning Meeting. The meeting itself belongs to the job seeker. It's not your meeting, even though you and I are looking for the direction. So unlike many others that might think that job seeker needs to be in charge in order for it to be self-determined; the job seeker must be in charge to the meeting or answer yes to everything. We feel strongly the job seeker needs to be part of the meeting and the person, actually determining what goes on the board. We don't see them up writing down the information or collecting or making decisions about the flow of the meeting. We see that job seeker as the one that when we go to complete the different information, we look at them and say can we put this up under this heading? They are pretty much saying oh yes this is me, no, yes, I do that but I don't want the to do that for a job. You are getting a sense, then, they are getting control of the meeting, without having to be the person directing the meeting.

We feel like, if you will notice under bullet 2, the job seeker needs to be free to contribute to the meeting. They need to also be able to decide who comes to that meeting. Most of the time if you ask, who would you like to have come to an employment planning meeting? Your job seeker are will say no one. They don't know

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anybody who can help. One of the things that I look for is that discovery piece. That during discovery, not only am I looking for who is this person, this job seeker, but I am also looking for that person who spent time with that job seeker, to be able to come back, say real clearly, here's important people, they have concepts about this individual, they know the individual, might have some connections in the community to open some doors for this individual. I recommend this group of people to come to the planning. So always look at this as a major piece of discovery.

This next piece is very interesting. No more persons paid to attend should be invited than those not paid to attend. Essentially, what we are saying here, don't just have paid staff and the job seeker at the meeting. You need to think about a balance. Always have a balance. Have an equal number of people that are there, personally connected to the job seeker. Have I had people that did not have people in their life? A job seeker that did not have personal connections in their life that might help them? Yes. But if you start off thinking about going to need to have more persons there that are unpaid, then you do this with all the people you are planning for, you end up with a couple of key, important features here. One is, you begin to pull in your community to assume someresponsibility, and support from them, to help open doors. If you don't do that, you are not going to be able to do this in the future again. You are going on have to have some job seekers that are here, that are able to have some folks, and some that don't have people from the community. The folks that don't have people from the community to bring to the table, you will use your agency resources for. I have also done very unique things, we will talk about this another time when we talk about building community about a person. It's very important to utilize the community members. You will be very surprised that if discovery is done adequately, there needs to be a picture of who this person is, in addition to a picture of possible connectors community factors. The people that may have worked at a place this person is interested in, not the owners of the business, merely people who know the community who might be able to open a door. That's how you want to think about the last bullet in that slide.

Slide 14: More Tips

Slide fourteen talks about more tips for good meetings. Bullet one really goes back to Mike's and my card playing days, trumps. Trumps in kind of the card that wins everything. You can have three very equal contributors to employment, interests, contributions, conditions, but one of those are likely going to trump others. By that I mean you are working with someone who has a felony, he has a condition of work, one of his conditions is that he work in a place, say his felony was for taking money that wasn't his. One of your conditions of work is that he not work in a place that deals with money, where he has any access to money. That will set him up for failure for the next time. That may become trumped over everything, because without that one piece, that could actually get him in more trouble again, back to jail.

Other trumps may be working with youth, for those thinking about transitioning. I have done beautiful plans with youth, then had the bigger trump of I want to work with young people. I want to work with people my age. I will have gone to a really good planning strategy to exclude places like MacDonal'd's and placed like that are fast food focusing more on career type things and then find out that what's most important in their life is that social component. One thing you pay attention to in discovery is what is trump. What will drop this if we are not careful and even if we are careful, how do we help people think about things. Trumps are going to occur. Sometimes it's the job seeker living with a parent, the parent, what they say may actually have a greater impact on what the job seeker does, as opposed to what you or I say. A person may hold trump in a meeting, and it's very important to understand that, before you go to a planning meeting.

Couple of other things that are just logistical things about the meeting. One is the timing of the meeting. I usually think about who is absolutely critical that needs to be there. So that I can begin to think about making sure that I have all the different players that need to be there, and that I am not going to plan this session and find out that mother is not going to be able to attend, yet she holds trumps. She can actually help promote what you are doing or she can actually influence if you go in another direction. I would think strong and hard about what we are doing here in terms of making sure that the pieces we have for the players that are there, are critical to this meeting so you are pretty aware of all that when you set your meeting up.

How long should it last? I would love to say an hour and a half. We used to train that for a long time. Really, an effective employment planning meeting, you can get done in two hours. This is not just determining an occupational direction, guys. You are going to see the planning is very strategic and you leave there with the very next steps of job development.

Slide 15: Facilitating a Customized Plan

So slide fifteen really talks about facilitating this plan. You need to think about whoever did the discovery, might be the best person to lead the plan. For those who are counselors there, you may want to learn the planning process and lead this process yourself. It's real interesting, you are actually all negotiators in this, the person who knows the job seeker best is really the best person to facilitate the plan. They will recognize body language that says I am shutting down, not participating. Once you start planning and the job seeker is not participating in that plan, you may find the plan is no longer of value. You really want to think about who is the best person to facilitate this.

Slide 16: The Customized Planning Meeting

While I was talking I moved to slide sixteen. Slide sixteen talks about making sure you've got the people that are coming to the table have access to that profile I talked

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with you about, in advance of the meeting, they have a chance to read it. You should make sure the job seeker and their family have amended any information that goes out in the profile. I would really say don't invite too many people. I have been to some planning meetings where there are so many people there you don't do anything, but a social hour. Keep it to a small group to really get outcomes. I would talk clearly about this is a meeting about employment, not about whether or not this person can or cannot work. This is going to be about who this person is in relationship to work, so it's a very prescriptive type meeting, so you get an outcome.

Slide 17: The Customized Planning Meeting (cont.)

Moving to slide seventeen, where should this meeting be held? The customized planning meeting really needs to be in a meeting area. Now, the reason it's critical to bring this up to you guys is that sometimes we have been in sessions to where you get the confusion between good person's centered planning, large meetings, people come together. This is not a person-centered planning meeting. The process is very person-centered planning meeting. However, this is not a person-centered planning meeting that would bring together people that are from the person's life, perhaps their grandmother, this is a very employment-focused meeting. You want to be very focused on the information I am going to walk you through in just a few minutes. You really want to think in terms of making sure that the information in which you gather, and the people that are there are people who can actually contribute to the actual development of the job. That's the key. Keep your eye on the prize, don't deviate. Make sure we are going to focus, why we are setting all the meeting up, to where you have the right players there, the right people that will be involved in this process; and that it is people that have a perspective about employment. It may be people, it may not be. I have invited an aunt before that was, if you are from the south, you might know what Junior League is, they are a social club in the community, they are all women, most of those folks know everybody in the community, and they can get things happening. I have invited a family member that belonged to that because they knew business owners. Begin to think about that. If you are in or near a job center, in any one of your job sites, I know in Georgia, you guys are in the same agency, so there might be an opportunity, but I always advocate for folks to consider a job center as a wonderful place to run this meeting and have the business liaison attend the meeting, that you need additional support because there are not people from the person's life. So, this is very important, that you think about where you are going to have the meeting. Make it very business focused; yet not lose the essence of who the people are you are planning for, so the meeting can pull out the best of who that person is.

Slide 18: The Customized Planning Meeting Flow

Slide eighteen, really talks about a flow. The very first thing in the meeting, introduce everyone, the goals, the guidelines for the meeting. Typically I am very up front, employment is the goal, the focus will be on possibilities, issues that may come up. You may have somebody discussing accessibility issue, someone talk about where are you

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going to live. I usually put up a piece of paper, say look, I understand that's important, here it is, but we are not going to do that at this meeting. If it not, you will get side-tracked. If you are doing a customized planning process you may find the person's life is very complex and more often than not many of the meetings that I have attended with folks that were not very directed and focused, there's an opportunity to get them side-tracked. You will have another meeting to discuss another thing. When I set up an employment planning meeting I am extremely focused. Those are my goals I am doing at that meeting. The meeting belongs to the job seeker, and at all times we are going to focus on the best of the job seeker. The process end result should guide us to where we are going on behalf of this job seeker. We do not start there, but it's where it's going to guide us. I usually let everybody know that, that we won't start off with where is this person going to work, we have an actual flow we have to go through.

Slide 19: The Customized Planning Meeting Flow (cont.)

Slide nineteen really gets into the first part of the meeting. This an interesting chart I put up, it starts with what works for the job seeker and what doesn't work. I really never put the job seeker on the spot, to say Jimmy, what works for you? What doesn't work. In fact, it's very empowering when everybody else in the room talks about the job seeker. I typically -- if a family member, even a counselor says this really works for the person -- I usually look at the job seeker and kind of get their nod of approval that this works. If it doesn't work, then we will talk about it just a minute. We might find that clarity is in the discussion part of this. I use this what works, what doesn't, as an activity really to get everybody in the group focusing on what works for the person. If they are real easy strategy, to have folks think if they bring up working with strangers does not work, then that helps me in the meeting kind of force the question, well if working with stranger doesn't work, what does work. So you are getting people to begin to channel, think in terms of well working with people they know on a day-to-day basis, really does work. So that lends me to what kind of environment we need in the workplace. That's critical information. I use this as an icebreaker, in kind of setting the tone to think about what works for the person. That's really going to be the creative flow of what we've got here.

understand that this activity, you don't want to make it an exhaustive list as you go through. Once you have had at least one person in the group making a contribution to this chart, I am then ready to move on to the nuts and bolts of the meeting. This is really a very positive part of the process here. Really kind of sets the tone.

Slide 20: What Works/ What Doesn't

Slide number twenty really shows you what this chart looks like. What works, what doesn't work. Very simplistic, you put it up on wall paper. In fact when people come to planning meeting, and I'm running the planning meeting I have all of the meeting flow -- already completed on the individualized wall paper, put up around the room so people can see the process which we are going to go through in order to see what will guide us to the job locations.

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Slide 21: What Works/ What Doesn't Example

Looking at slide twenty-one, a kind of sample, what doesn't work, constant demand, sitting in one place, being teased, eating anything green. You can make any one of these things into what works. Typically, if I find something that people seem to be a little bit over whelmed by or a cloud about this person. Being teased is a big deal, that can take on a big point. Being teased is such a subjective kind of thing. It can be -- it's not at all objective because somebody else, you could say well, why is your hair that color, they would think they are teased. I flush out some of the language here so we know what people are talking about, unless it's not already done in the discovery. This chart really gets the meeting started. Gets the meeting flowing.

Slide 22: Characteristics of an Ideal Job

Looking at slide twenty-two, where you get into the nuts and bolts of a good plan. The three critical components for me, for any kind of planning, and by the way, I do this for myself, for my son, I do this for my neighbors. This is a process about people. This is not a process just for people with disabilities. This is three critical pieces of information you need to have clarity about in order to actually plan. People that are unclear about any one of these three may find themselves searching as opposed to being very focused in their job hunt. I have recommended this process, at least the thinking of this process to come from, even job centers where they have large numbers of people coming through their system. I have recommended that the counselors there think in terms of this, so they have real understanding about what it is they need to know in order to effectively plan. We get into the pieces here where people don't even know what's critical information, in order to plan, you lose something. If you are going to empower people you need to know these three things to do effective employment planning. Then you are teaching them about how to think about employment. Even if they do a wage-driven employment, they need to know these three things about themselves.

Let me go into what each one of these three things mean. They are interesting pieces that to me, having thought about them, really have got different points, in my personal life, gotten me to different points in a job.

Slide 23: Characteristics of an Ideal Job (cont.)

First let me deal with the language. Characteristics of an ideal job. Up in one of the states we were working in I had people say, why does it have to be an ideal job? Why not just a job? Guys, there are three reasons people take jobs, just in general, not in your handout. The first reason is it's just a perfect fit. The second reason is because they are so young, they don't even have conditions of employment. They could be young, not need, a lot of people on Social Security, they are already learning to live, within the means of what they have. Getting them a job is almost somewhat disruptive. You will see for them, you really can't just throw something out there, say do it. It's

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going to have to be a goodness of fit for them. The first reason people take a job is goodness of fit. The second reason they take a job is because they don't have many conditions of work; and really a lot of your Social Security people do have a lot of conditions of work. The third reason a person takes a job is they are desperate, it's as simple as that. They are absolutely desperate. Unfortunately many people that have disabilities fall in that third category. They are desperate, people aren't offering them two jobs at once. They are offering them one job, then saying why aren't you taking it? In some situations made to feel guilty if they don't take it. I am not saying you do this, I am saying this happens in the human services system. Understand that we are looking for the job that is goodness of fit. So if I can get my head around planning for the best fit of a job for this person, then the likelihood of them staying on that job, not rotating through to me again, as a counselor, then I am actually raising the bar here. I am not just saying any job, I am looking at the job that has the best goodness of fit. That's how we think, and that's why we use the characteristics of an ideal job. So if you can visualize all the pieces to it, then you can also might be better able to get the job for the person.

Let's start with one of the characteristics - conditions. Conditions are characteristics of any job for the job seeker. You and I have conditions of work. The very basic ones are the days you upon want to work; how much money you want; what are your benefits? I bet you money out there many of you have had to consider having healthcare. Answer the question "yes" or "no" if it healthcare was a requirement of you taking a job. I want to look at who we are. Answer "yes" or "no." Many of you are saying yes. You have a few saying no. I bet you money it's because they are getting healthcare from somewhere else. Healthcare is typically a primary piece now days. With many people, particularly some folks that might be receiving social security benefits, we have to educate folks so they can receive social security benefits and get a job, and earn more money. So, healthcare in a lot of ways is what you have to have a lot discovery discussions about, just the benefits piece.

Location of the job. I have been interviewed by people and have interviewed people to work for me in our consulting service here, people sent them 30-miles away. They can barely get here for interview. I knew they were too far away from their home site to even consider working with me. So, location of the job; time of day, whether or not it's inside or outside. Whether or not -- it's an important feature they have certain things. You get into folks with a lot of complexity, say for instance the young person that has been through substance abuse rehabilitation. That person themselves may need to be in a drug-free environment where they are not exposed to anybody that might be. So coworkers. That's a tough one to locate. I work with folks who had sexual offenses before. It's clear their conditions of work be to not work in a place with, say, for instance, children there at all. I worked with a young girl that bit her nails all the time and bled, she needed to work in a place that did not require and any type of sanitizing. They had her rolling silverware. That was a contradiction in itself, she didn't need to be in that job. It's some of these that are no-go conditions. You have to really think about

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this. This is not what I want, this is what kind of things do I need to be successful. For some of the people you work with, they may have fatigue points in a day. I worked with folks with mobility issues that have fatigue points. They may work for a couple hours, be in total fatigue. So their total number of hours a day might be six a day. However, you might have to negotiate with an employer for them to have, work an hour and a half, then take a 30 minute break. Work another half hour, take a 30 minute break. The Department of Labor doesn't allow for those kinds of breaks, it may be negotiations, unpaid time during the work day. It might mean jobs for which they work partially in the morning, go home, take a two or three hour break, come back to work. A lot of different ways, conditions, one of the major characteristics of an Ideal job. Many of us look at this, think it's very simplistic, time of day, hours, but it's the really the complexity of who the person is.

Slide 24: Conditions for Employment

Let me move to slide number twenty-four. Slide twenty four really just kind of puts the chart up here, so all of you can see that this is something that you would need to have and have clarified so that everybody understands it, particularly the job seeker as they go do it. You may find that you lift it here initially. But what you will have to do is go back for the job developer to really have more of an in-depth understanding of who this person is.

Slide 24: Conditions for Employment Example

Now, let me move to the next slide. Slide twenty-five gives an example of this. Working with one supervisor, think about that. Have you ever had a job seeker that really needed to have just one supervisor? They would get frustrated, quit when they have more than one or get confused and shut down. Think about who might need to have just one supervisor. An accessible workplace; personal assistance for toileting and eating. Here's an interesting one, work area with minimal customer contact, because that's not the best of them, dealing with strangers. What about job tasks, with structure and routine. For instance, I had a lady -- had a gentleman that, one things we looked for, that he was very intent. If you worked with him longer than an hour, he exhausted you, he was just always asking questions, in your face. One condition of work was to change supervisors or coworkers every hour. You are thinking, how did you negotiate a job for something like that? He ended up working at a resort, worked about an hour with a yard crew, about an hour on the inside of the lobby, doing straightening up activities there. Worked about an hour in the office. He had this -- a routine, but he moved about every hour. Very structured, but at the same time, it also had the other piece that he actually changed his environment or his supervisor every hour, so he didn't actually put a drain on who those people are.

Conditions for employment are pretty much one of the more critical pieces. I can't even imagine for a wage-earned job, you would need clarity forever this on every job seeker. Your conditions for customization are probably the pieces that would have to be

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negotiated for a custom job, working with one supervisor, working with minimal contact. Some of those can be very prescriptive about what the job site needs to look like. Let me stop here, see if any of you have any questions at all on conditions of work. This is such an isolated area and I feel very important that you get this particular one. Do we have questions out there about this?

Slide 26: Characteristics of an Ideal Job

Well, I'm going to move on if there are no questions about this so we can move on and make it through the rest of these slides. And this is one of the pieces that you might perceive as in contradiction of the Employment that that you have to write, your IPE in that we ask you to be very broad and general. You will notice on slide number twenty-six, working around boats, office work, or working in a retail setting. This allows you to be very broad and in general so that you can be very prescriptive in the job task and in creating a job for customized employment. Remember that customized employment actually creates a job and does not center around a job title. Thus we avoid job titles in the actual development of your plan.

Slide 27: Preferences & Interest Areas

So looking at slide twenty-seven, you will see we have a few numbers of spaces here, and I would have a wall paper up that would look very similar to this.

Slide 28: Preferences & Interest Areas Example

And slide number twenty-eight gives you some examples of that. Now, you really want to think through that. There is a project going on right now, in one of the states, not in the south eastern region, that is trying to figure out how you can actually you can create a broader picture of your employment plan under your broader employment plan your IPE. I understand there is ways you can go broad if you can. I would encourage you to do that.

Slide 29: Characteristics of an Ideal Job (cont.)

Slide number twenty-nine, this gives you the characteristics of an ideal job. These are the contributions. Many of the pieces have actually been flushed out in the discovery process. So your planning meeting is not a discovery meeting. You should know this information before you even go in to the plan. I'm going to go through these individually and then explain.

Slide 30: Contributions: Personality Characteristics

Personality characteristics, your wallpaper would have this on it and you can add in there the descriptive examples.

Slide 31: Contributions: Personality Characteristics Example

Moving to slide number thirty-one, it might be that this person is attentive. They are passionate about working at what they enjoy. These are personality characteristics. Pieces of information that are interesting enough. Some of these can be conditions of works. For instance, I have worked with someone that no matter what they did, they spoke what is on their mind. That works really good if you are working with a co-worker that understand who you are. But that characteristic doesn't work well if you are working with customers who are just walking through the door. You can see how the personality characteristics can be a contribution, if it is in the right place. Therefore, you may have compared with it a conditioned employment that says, minimal work with the customers.

Slide 32: Contributions: Skills

Looking at slide number thirty-two, this is where you are getting a look at the skills and the contributions. And this is what we find that we don't pay a lot of attention to, as to who they really are. Looking at their general plan you can see the examples. You can look at the plans, the plant general care and maintenance, communication skills with customers and co-workers, use of garden tools. And for instance, we just had a customer who had an interests in automobiles. So we really flushed out what was his knowledge in automobiles? What are his skills? As it turned out, he knew a lot of equipment that came with cars. He knew how to change a flat. He knew how to change the oil. He had some really basic skills that were there. We found that out through the discovery, and then that was captured here as part of our planning.

Slide 33: Contributions (cont.)

Moving to slide number thirty-three. You are going to find contributions that include credentials, experiences, and recommendations. All three of these are very important. Credentials can be a GED, diplomas from colleges, and you are going to have folks with experiences, that have done some work experience or previous work experiences, or employments that they have. This is where that information is going to go. This is where the recommendations that they may have. I work with a young lady in Georgia that has a master's degree in social work, but she never had a job. Voc Rehab had sent her all the way through to get her degree but she still didn't have a job. She had a significant mobility issue. She had conditions of employment, but people didn't think about how to use her research piece to help her develop a job. She couldn't compete for the traditional social work job because of the mobility issues and her declining health. She could have easily contracted to do some research on her own time if we would have looked at what her contribution were and her conditions of employment.

Slide 34: Development of a Task List

Looking at slide number thirty-four is really an interesting shift. Now I think up until now many of you most of you will understand. You look at a person's contributions, the

person's conditions, the experiments, and the experiences. From that point all of the information comes from discovery. So from that point on, you are looking at the creative piece. If you are looking at who the person is, their areas of interest, their contributions, you will be developing a task list. What kind of task can this person offer an employer? So you really have to have some clarity here. I always use this list to go back and I keep all of the other posters up on the wall. I am ready to go back when they say, oh, you can do this task, and I will say, show me how that relates to your areas of interest. This happened to me last week. And they said, oh, we can do janitorial work. When we think we can show him how to check the gas gauge, check the air pressure, learning how to rotate tires. Why aren't we getting him a job with those tasks as opposed to janitorial work in the automotive shop. The interesting thing is, we slipped back there. You're task list is comparing your conditions, your interests and your contributions as you go there.

Slide 35: Skills vs. Tasks

So let's move to the next one. The difference between skills and tasks. Skills are what they already do. And the tasks are what you think they have the potential to do. For the example that I just gave to you. The man didn't know how to change oil. Did not know how to read the pressure in a tire, but we thought he could easily learn that based on his discovery. When you begin to look at the tasks list this is when you begin to promote and moving forward, looking for the possibilities of who this person is.

Slide 36: What are Job Tasks?

We are looking, now, at slide number thirty-six. Here is a kind of a cheat sheet for you to think about. Start with the area of interest. Think about that area of interest that matches the job seeker's contribution. Say they are interested in cars. You want to go there and then you look at the contribution. Then you want to look at, well he learns quick, he recognizes the different car parts, and then he can likely learn how to read and measure the gauge with airing up a tire, he could learn how to do the oil change. So that is how you begin to do this. You want to avoid the job titles when you are in this process at all points. I know this is contradictory if you have to plan for it earlier on. But I will talk a little bit at the end of this about how we can work around that, and how some counselors are doing this now to make it work. You want to avoid titles like job greeter versus greeting. You want to think about some of your tasks by starting off with helping people with a different list than automobile. These lists are tasks that you are proposing to the employer. These are a list of tasks that the job seeker might do. You want to think about this so that you can offer this.

Slide 37: Development of a Task List (cont.)

Slide number thirty-seven, this is some more tips in doing this. You want to include the tasks that the job seeker is likely to perform. We have combined similar like tasks and you want to number these tasks and you will see why in the plan as we come back to this.

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Slide 38: Tasks List

Slide number thirty-eight. This is a simplistic chart this would go on the wall that you would utilize in a way to think about the task list and have them fill it out in the planning meeting.

Slide 39: Tasks List Example

Slide number thirty-nine. This is an example of tasks. This is very important. If you are going to customize a job, you want to think about that you are not going to go to a job opening, you are going to go and make a proposal to the employer. The task list is the first proposal to the employer that really talks about “do you have any of these needs?”. So when Michael does the next webinar, How do you do an employer's analysis and how do you do a proposal here? You'll see this is going to be a critical piece in the unique process in customizing a job for someone.

Slide 40: Tasks List Blank

Slide forty, this is a blank so you can see where you would have the task list again and it will provide you with a list to put the task lists in and the areas of interest.

Slide 41: Job Tasks

Again, this includes the examples that you have -- samples of what you might have for tasks on slide forty-one

Slide 42: Specific Employer List Overview

Moving to slide forty-two, this is where you really understand now what a customized employment plan looks like. Because when you leave here, you will have really looked at this individual and you will have carved out what environments they work best in, times of day, what kind of supervisors, all the things that will be critical for this person. You would have carved out their interests, carved out their contributions, and you would have been creative in linking the dots. You are not brainstorming. You are linking the dots to their task lists. Now you are doing more creative yet linking. You are now thinking about the specific employers that might need these tasks in your community. That's the employment list that you leave with. You will have at least 15 to 25 employers that you identify. Those become very specifically. These are the employers that would be called upon for this job seeker.

Slide 43: Specific Employer List

Look at slide number forty-three. You have a CRP, and they are running this planning meeting and you say are you job developing for Henry? You are expecting them to go to the employers that are on the list here. You may say that this is more employers that you have in your own town. But we may need to do a webinar, very specifically, on

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smaller towns. I have job developed and done plans for people in small communities, and we have to look at all of the communities around them. I have to look at where we will go. Where do the neighbors work? This may lead us to self-employment. This list can also involve contracting for work. I will think about that. I can see that many of you is a topic for another webinar, and I will talk to others about that if you are interested in that.

Slide 44: Connecting the Employer Call List to the Job Seeker

Looking at slide number forty-four. This is where you really connect the employer call list to the job seeker. That's the simplicity of it. If you have the customized employment, you would ask your CRP to say, Show me the list that you are going to the person on behalf of the person you are going to be offering the service for. That list of employers should be very tied to who they are. You are telling me about the transportation, and one of the first things in the discovery that we are looking at is the transportation. Some of your conditions of employment are likely that they are going to travel with someone back and forth from their community. They have transportation built in to the job site. We have had to work at places that do pick ups for others. You can have the job pick ups and you can have the transportation. Transportation is part of the conditions of work. That is for everyone that we deal with, and it has to be individualized thinking for that.

Slide 45: Specific Employer List Example

Looking at slide number forty-five. This is what your final list would look like for a CRP. Hopefully you are at this meeting, you understand you are going to work at the Woolmarket nursery, but it is in a list and a realm of transportation that you would need. You are looking at the tasks that the person might offer. Are these the tasks that the job seeker can offer. You can list the tasks, here are the things you can offer Home Depot 1-8. The contacts here are not the people at the nursery. These are people that might know someone at Woolmarket nursery so you can do your first step of job development which is research about that business before you go there. You don't say, here is my list, I'm going to Woolmarket Nursery. There is a whole set of job development strategies that must occur after this.

Slide 46: Contacts

Looking at slide number forty-six. This is where you see me listing. The contacts are people connected to the job seeker. You are going to use them for research like, are they hiring? Are they laying off? If they are laying off, it's easier to develop a job there than to compete for a wage-earning job opening. They may be the person to set up the appointment. They may assist in your presentation. You are actually in your planning session thinking about your best strategy. If you have the right people at your planning meeting, let's say a church minister, they might be able to do a lot of work for the job seeker.

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Slide 47: Prioritizing the Employer Call List

Moving on to slide number forty-seven. You may have 15 places that you are going to approach. To be honest with you, the quality job developer should wrap it up in the top five. That is someone who is really good at job development. If they do the steps to job development then they are not just calling people up and asking for job openings.

The prioritization of the employer call really encourages the job seeker to say, where do I really want to work? I try not to get people to say what is my number one place, I usually get folks to say, give me your top three. That way it is easier, people do not feel put on the spot.

Slide 48: Conditions, Contributions, and Interests! Guide Employment

You are going to see this blend of all of this. This is a young man in the community of Mississippi. When we did his job development for him, one of the conditions of work was, he worked primarily not with customers but with the co-workers. He is watering, and that means we divided the area off so that your customers didn't come in there. We sat down and we looked at his interest. The one thing that he paid attention to was plants. He had contributions in this, and we negotiated for this.

Slide 49: Conditions, Interests, Contributions

This is another young man. The school actually took him back and forth. Transportation was a major condition of his work. One of his interest was kind of sorting and organizing things. If you gave him something to do, he would put it together for hours. That was also one of his contributions.

Slide 50: Outcomes of the Meeting

Looking at slide fifty. The outcomes of the meeting are pretty clear. You are going to have a blueprint. When you leave the meeting, you need to have the interest and the presence. This becomes the terms of the negotiation. It becomes the script for job development, it takes you to the next step.

Slide 51: Outcomes of the Meeting (cont.)

Slide fifty-one talks about having a list of employers that are prioritized. You are going to have the connections. What is next. You should leave that meeting with who is going to do what next.

Slide 52: Discovery/Plan Lead to Customizing!

Moving to slide fifty-two. This is really where you are seeing the piecing of the discovery and the plan coming together to customize for all people. You end up with a tailored job description and that is kind of the key here.

Slide 53: Employment Plan

Slide fifty-three. You will see this is what a plan looks like. It's simplistic. I have a sample of what a blank plan would look like for us.

Slide 54: Introducing Dee

Slide fifty-four. This is an example here of what you might see in the way of a persons conditions and interests.

Slide 55: Introducing Dee (cont.)

And slide number fifty-five, talks about the contributions. Today we don't have time to go through this today as an example, but this is what you start with, and you would begin your linking of the dots here as far as what task will this offer someone. These are real people. These are not made-up people, guys.

Slide 56: Tasks

Slide number fifty-six says what tasks can this person can offer.

Slide 57: Customize the Job Search: Employment Planning

And slide fifty-seven, it takes you back to the plan.

Slide 58: Distinctions between the Customized Plan Process and the Rehabilitation Plan

I'm going to move forward now. I am going to have us to think about, just a few minutes, of what is the relationship between this and your rehabilitation plan. There is a lot of distinctions here.

Slide 59: Typical Information

Slide fifty-nine says that your typical information of conditions and typical information of interests and contributions should be a part of your plan. I can't imagine that not being a part of everybody's plan right now. You need to take in to consideration what people's interests are.

Slide 60: Additional Information Needed To Guide to Customizing a Job

Slide sixty, talks about the additional information you might need and that is where you look at a person's conditions of employment, their tasks to offer and then very specific employers and the specifics of what the job seeker needs.

Slide 61: Rehabilitation Plan

Slide number sixty-one. You can authorize services and often time you can authorize discovery for someone if you have a CRP that does it. You can also authorize them to do a plan and participate in that plan. A customized employment plan does not authorize the services at all. That's a very clear distinction. The customized employment plan is the guide to which job. You guys have to specify a very targeted job almost immediately, and we would like for you to leave that as open as possible in the career areas, and understand that if a person doesn't have clarity, then you will have to make the changes on that. Like I said earlier, I have been talking to other states on the pilot projects on how you might not have to specify for the people you are unclear about at the beginning. They are working with the RSA on that and I will be doing research on that to help you. You also have a time frame. You have to get your plan up and going. In many of the states that we have worked in, we have to get the counselors to come up with the authorization of just what you would do with an evaluation, the discovery, before you go in to the service or industry that they may want to go in to.

Slide 62: Information Required

Slide sixty-two, really asks you to think about what are you required to gather versus what you really need. I think you are going to have to decide. You need to go back and look at your plans. These are the plans that are going to meet your RSA and your state requirements. That is your information required. For some people, it will meet their needs. For some people, it may not. And for those that it doesn't meet, you need to think about what information you need to add to this. The whole focus is for you to get more outcomes. You may have to figure out a way and do a more strategic type of planning to get your outcomes and also meet your federal work requirements.

Slide 63: Potential Users of the CE Plan

Looking at slide number sixty-three, you will understand that there are potential users of the customized employment plan. Those looking at a demand driven job, meaning they are going to apply for the jobs, you can use this process to help them to think about their conditions, their interests, their contributions, et cetera. What connections do they have in the community? You can go through this with them and you can think about the things you need to look for. It may be the job opening, but if it is a customized employment they will have to do the whole process beginning with the targeting potential employers considering their areas of interests, conditions, and contributions. Instead of a job opening, at the bottom of sixty-three, you are looking at the job proposal. So there are two potential users for the customized employment planning process.

Slide 64: Critical Customized Employment Steps

Slide number sixty-four is just a recap of what the customized employment steps are. That is Discovery of a job seeker, development of a job seeker profile, and what we are talking about today is development of customized employment plan. There is a representational portfolio, we will have a webinar on that. And how you can present a job seeker to an employer by providing a representational portfolio and provide a job development call.

Comments and Questions

Slide sixty-five, is really a point for me. This is a good place for me where we can open it up for questions. We have about 5 minutes, so do we have any questions we can answer right now that you would like for me to answer? Steffany, is there anything that anyone needs to do in particular to ask questions? You can write your questions out or you can ask it, I think.

Great question. How does the discovery process begin? Many of the states are looking at this as an alternative to your traditional evaluation. It begins with an explanation to the job seeker, and it explains the difference between the job opening and looking at creating a job and making a proposal to an employer. The discovery process requires you to take off your evaluative lens where you are looking at can and can't, but this is where you are looking at how it can be done. The folks are losing their jobs through their social environments and not fitting in, and that is a piece that is equally critical to people as their skills and their particular areas of interest. There is a webinar that is at the tacesoutheast website, and Steffany will be able to write that up so I don't mess it up. But if you look at that, I think the webinar was recorded and you can actually here that.

What are the time frames for the discovery process? Typically a four to six week period with sixteen hours- 16 to 24 hours of actual hands-on time with the job seeker. It can be less than that depending on the job seeker, and it is traditionally a set of interviews and observations and time with the job seeker in their home. We don't see the counselors doing the discovery process, we are seeing that you are authorizing that the process be done on someone.

I did the PowerPoint today was about the plan. It's critical for the counselors to be a part of the plan. You need to be interviewed by the person who is doing the discovery, because you would have inside information about who that job seeker is also. It does things that you as a job counselor can not do. By that I mean go to the job seekers home. You need to go to the job seeker's home, how far away are they? Are there other cars? Other homes? Where do people work near them? You can ask those questions from your office, but there are times you have to go out and look around. We have had people in discovery giving a list of the potential work sites that the job seeker can walk to rather than asking those types of questions.

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Is this similar to identifying the jobs at various employer's sites, the discovery process? Debbie, without knowing the context of that question, I'm going to just shoot here. If you done the discovery process, and you go to a planning process like this, yes, customization would call on these employers, and they would be identifying the job tasks and making that proposal to the employer. It would not be identifying the jobs within the job openings. That's the distinction.

Art is asking a question. I may have missed it. What happens when a client evokes the client preference? I'm not sure I understand what client preference means on that. You will have to help me on that. So, perhaps, that's a private phone call, Art, that we can have after this.

Guys, we are about out of time right now. If you have any further questions, I will be glad to respond to you. You can send those questions to me, and I will try to answer those individually, or you can set up a conversation with us. Remember Mike and I work with TACE as consultants, and we are offering each state customizing with employment. So someone in your state is working with Chip or Jill. Thank you, Stephanie, for moving the next slide to me.

In regards to your question, Art, they want to do a job that is more practical. One of the interest pieces is: If you are doing your discovery, you are not asking people what they want, you are actually empowering them with what they are best at. So you sort of avoid this question of impractical outcomes. It's a really fun thing I am sorry I can not be more helpful in the short time frame we are in. I want to say thank you for participating. Steffany, I will turn it back over to you.

Closing

Steffany: Thank you all for your attendance. Can everyone -- hear me. All right. I still have everyone on. You see that this webinar is approved for the CRCC and the CEU credit. The deadline is December 15th 2009. If you have questions, please send them to the e-mail address tacesoutheast@law.syr.edu in front of you now, and I will happily forward them to Norciva. Thank you and have a great day.

[Event Concluded, December 07, 2009]