



## Employment First! Employment for All!

The essential role of  
Customized Employment in  
assuring the success of these  
two movements

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Kim's journey to  
employment  
helped us  
understand the  
necessity of  
customizing  
employment



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A poorly matched competitive  
job almost cost her a chance to  
work



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By using customized supported employment, Kim has worked for over 15 years



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What about employment for Jennie, a young woman who never considered a working life much less what she might want to do?



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She was employed at a logistics company for a year and a half...



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Jenni now works at a local gas company using customized supported employment...



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## Customized Employment

*According to US/DOL:*

Customized employment is a flexible process designed to personalize the employment relationship between a job candidate and an employer in a way that meets the needs of both. It is based on an individualized match between the strengths, conditions, and interests of a job candidate and the identified business needs of an employer. Customized Employment utilizes an individualized approach to employment planning and job development — one person at a time . . . one employer at a time.

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## Unbundling & Flexibility

Employers have typically met needs by bundling demands into job descriptions. These demands can create barriers for some job seekers. Customized Employment allows employers to "unbundle" demand and to take advantage of discrete competencies.

Flexibility is a universal design strategy that acknowledges the reality of complexity in the lives of job seekers. When businesses offer flexibility, many barriers to employment can be overcome.

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## Customized Process

- Discovery
  - Capturing discovery through profiles
  - Customized, person-centered planning
  - Portfolio/visual resume development
  - Job development and negotiation
- Here, CE dovetails with Supported Employment*
- Job site analysis, accommodations, support

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## Free materials at [marcgold.com](http://marcgold.com)

- Profiles, Part I, II & III forms guides and samples
- Customized activity log for data
- Customized Plan for Employment form and sample
- Numerous articles, chapters and white papers
- White papers:
  - Comparing CE to SE
  - Discovery
  - Profiles
  - Customized Plan
  - Visual Resumes
  - Negotiating with employers

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## The Individual's Blueprint: Developed in Discovery

### Conditions for Success:

This area focuses on the ingredients that must be available or avoided in order to make employment feasible, enjoyable and successful for the job seeker. All of us have conditions for success.

### Interests for employment:

This area focuses on the intrinsic interests of the individual that can provide direction for the type of work they might find meaningful. These interests are found from the job seeker's life.

### Potential Contributions:

This area focuses on the specific potential benefits that the individual will offer to employers. These contributions are translated from the job seeker's best skills of life.

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## The Employer's Benefit: Developed in a Needs Analysis

### Unmet Workplace Needs:

This area focuses on tasks that need to get done but are not getting done in the way the employer would like. It also can include tasks that have not been performed but need to be.

### Tasks better performed by others:

This area focuses on aspects of jobs that might better be performed by others at a lower pay grade. This option can directly save money for employers.

### Specific Benefit/Productivity:

This area focuses on workplace needs for additional productivity in specific tasks. It must be matched with job seeker's specific competencies.

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## The Business Case for Customized Employment: Balancing the Equation

### Flexibility Needed

1. Addressing conditions for success
2. Focus on interests
3. Specific Contributions

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### Value Added

1. Addressing unmet needs of business
2. Tasks better done by others
3. Tasks that enhance the business

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## Single Source Jobs: Tasks derived from a file clerk position to do sorting and filing



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## Multiple Source job: Local radio station

Tasks from:

- Reception
- DJs
- Advertising
- Station manager



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## Multiple Source job in child care: Began as a single source job



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## Created Jobs: Providing delivery in an insurance company



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## The Unique Role of Discovery

Comparative assessments and process often hit directly and negatively on the impact of a job seeker's disability. The results can lead to exclusion from work and lowered expectations.

Discovery is a qualitative process that avoids comparison by translating the individual's best features to employment possibilities.

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## Discovery

"Discovery consists of looking at the same thing as everyone else and thinking something different"

Albert Szent-Gyorgyi (Nobel Prize winner who discovered Vitamin C)

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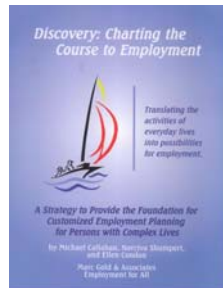
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## A Resource for Discovery

This manual on Discovery and it's companion for Profiles are available from MG&A. Phone number below.



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## The job seeker's customized blueprint

- Conditions for Success
- Interests toward an aspect of the Labor Market
- Potential Contributions to Employers

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## Characteristics of an Ideal Job

**Conditions** are characteristics of *any* job developed for the individual. Conditions refer to issues such as days of work, pay, benefits, location of the job, inside/outside work, time of day, hours per week, etc. While it is possible to have too many conditions, these are extremely important considerations in customizing a job. Target *go/no go* conditions for priority consideration.

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## Characteristics of an Ideal Job

**Interests** are characteristics of an ideal job that gives direction toward a certain area of work interest. These should be stated in the broadest possible manner, allowable by the applicant. Interests might include: working around boats, office work or working in a retail setting. Do not confuse work preferences with preferentially-stated conditions. *Avoid* using job titles.

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## Characteristics of an Ideal Job

**Contributions** refer to the individual's characteristics that will be offered to employers. These might include:

- Personality characteristics*
- Skills*
- Credentials*
- Experiences*
- Recommendations*

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## Discovery and Customization

These are compatible concepts that are used sequentially to facilitate employment for students who might otherwise not achieve employment.

*Discovery* provides the foundation information for individuals that is then used to *customize* a position with an employer.

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## Employer Needs/Benefits Analysis

**Unmet Workplace Needs:**

This area focuses on tasks that need to get done but are not getting done in the way the employer would like. It also can include tasks that have not been performed but need to be.

**Tasks better performed by others:**

This area focuses on aspects of jobs that might better be performed by others at a lower pay grade. This option can directly save money for employers.

**Specific Benefit/Productivity:**

This area focuses on workplace needs for additional productivity in specific tasks. It must be matched with job seeker's specific competencies.

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## CE & SE: Focusing at opposite ends of employment services

Customized Employment (CE) focuses at the beginning of the employment process and seeks to customize the relationship with employers.

Supported Employment (SE) focuses on the services needed to sustain successful employment once a job has been developed.

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## The Employment Matrix

	<b>Competitive Employment</b>	<b>Customized Employment</b>
<b>Natural Supports and Reasonable Accommodation only</b>	<i>There are job seekers who will not need either SE or CE to become employed and to stay employed</i>	<i>There are job seekers who will need CE to become employed but will not need SE to stay employed</i>
<b>Supported Employment and Natural Supports</b>	<i>There are job seekers who will not need CE to become employed but who will need SE to stay employed</i>	<i>There are job seekers who will need both CE to become employed and SE to stay employed</i>

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## Features of Customized Employment

- Based on discovery of the applicant more than on evaluative/comparative processes
- Driven by a customized plan developed by the applicant's strengths, needs and interests
- Focuses on tasks rather than job titles to negotiate essential responsibilities

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## Features of Customized Employment

- Specific job duties are negotiated with employers, voluntarily, to customize the job
- Occurs in regular community workplaces or in self-owned businesses
- Involves pay of at least the minimum wage up to prevailing wage

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## Features of Customized Employment

- Applicable to all users of workforce system
- Includes on-going supports and reasonable accommodations, as appropriate
- Starts with the individual as the source of information and direction to labor force

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## Single Source Jobs: Tasks derived from a file clerk position to do sorting and filing



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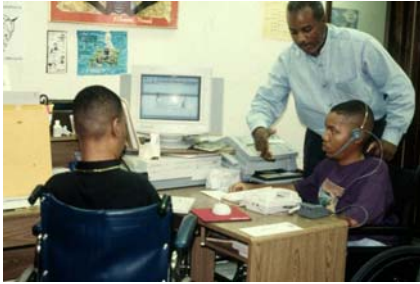
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### Example of a Single Source, Shared Job: Maintaining customer database



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### Multiple Source job: Local radio station

Tasks from:

- Reception
- DJs
- Advertising
- Station manager



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### Multiple Source Job: Performing various jobs within a music store - set-up, cleaning...



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### Multiple Source job in child care: Began as a single source job



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### Created Jobs: Providing delivery in an insurance company



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### Created jobs: Stopping "Slip and Falls" in a factory



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*But is employment for everyone?*



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Customized Employment makes employment possible for all people: Marci provides "specialty stapling" as a contribution



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## Capturing discovery through the use of a Profile Document

Positive paper for persons with significant complexities

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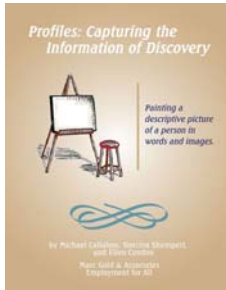
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## Resource for the Profile at [marcgold.com](http://marcgold.com)



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## What is a Profile?

- The Profile document provides an alternative format to the traditional evaluation reports that test and compare persons with complexities to general standards and to others.
- The Profile document allows service providers and funding agencies to see possibilities for the individual.

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## What is a Profile?

- A Profile is a document that represents the best and most meaningful aspects of a person's life.
- A Profile is the foundation --the information source-- for all person-centered, person-directed plans.
- A Profile is a work-in-progress during the transition years of school and in adult services outside employment.
- A Profile *is not a plan*, but rather the discovery component of any effective plan.

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## Focus of Parts of the Profile

- Part I: *Developing identification information necessary to get started*
- Part II: *Describing the individual across an array of life domains*
- Part III: *Summarizing the information discovered during Part II as a preparation for the customized plan*

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### Discovery can lead to a Profile document which is:

- **Narrative:** *It uses complete sentences to describe the person.*
- **Comprehensive:** *It covers all relevant areas of the person's life relating to employment.*
- **Robust:** *It fully develops aspects of the person's life so that contributions and qualities can be translated to employers.*

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### Discovery leads to a Profile document which is:

- **Respectful:** *It belongs to the individual and therefore treats carefully the intimate information which is developed.*
- **Non-Competitive:** *It does not require comparison against any arbitrary norm, skill or other person.*
- **Optimistic:** *It focuses on the best of who people are rather than on difficulties or shortcomings.*

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### Discovery leads to a Profile document which is:

- **Descriptive:** *It describes the individual and carefully avoids any evaluative or opinion-based statements.*

*This is perhaps the most important characteristic of the profile in that all persons can be described, regardless of the significance of their disability.*

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## Descriptiveness ► Competence

By focusing on a description of the performance of the individual, without the evaluative lens of ourselves and others, we have a chance to begin to see possibilities for competence and skills that might be offered to employers.

This is made possible due to the fact that descriptiveness gets at the concrete actions of the individual. These actions have a direct connection to tasks needed by employer.

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## Descriptive writing in the Profile

*The following represents the notes morphed into the profile section that relates to Scott's routine:*

*Scott currently is awakened by his parents or in-home support staff at approximately 6:30 AM during the week. However a plan is being put in place for Scott to begin using an alarm clock to wake up on his own as he begins the school year. Jessica (support staff), has programmed Scott's PDA as a way to prompt him to wake up, as well as complete his routine. He often is awake prior to 6:30 and he plays video games on Gameboy that sits on his high stand. Scott checks his PDA and/or a typed sheet of paper first thing each morning for a "to do" list of tasks. He locates clothes in his dresser and closet and puts them on, though occasionally he gets items such as underwear and pants out of order and needs to be reminded by his staff person.*

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## The Customized Plan for Employment: Creating a Blueprint for Job Development

A Strategy for Individualizing Job Development by Creating a *Blueprint* to be used by the Job Developer

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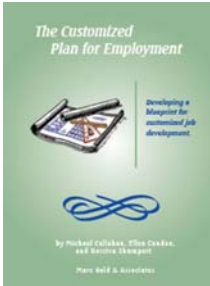
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**MG&A** A Resource for Planning at [marcgold.com](http://marcgold.com)  
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*The Customized Plan for Employment*



*Developing a Manager for customized job development.*

By Michael Callahan, Steve Coates, and Dennis Skougart  
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**MG&A** The CPE: The linchpin between the job seeker and employers  
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This meeting identifies an individual's conditions for employment, individual interests and potential contributions and creates a listing of job tasks to be performed. The CPE then directs job development efforts towards specific employers to meet the job seekers characteristics of an ideal job .

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**MG&A** Like planning for a custom home  
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This process is something like homebuilders meeting with the architect and builder for the design of a custom home.



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## Introducing Sadie

- Sadie is an 21 year old graduate of Natchez High School.
- She is looking forward to going to work in her local community.

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## Sadie has a full life in the Natchez Community



Her home



Sadie's Dad

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## A people person . . .



Sadie's colleagues on the yearbook staff at school.



Sadie's best friend, boyfriend and teacher

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## Sadie has skills related to office work



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## Customized Plan Structure

Following introductions and an overview:

1. What Works/What Doesn't
2. Characteristics of an Ideal Job
  - Conditions for Success
  - Interests towards aspects of the job market
  - Potential Contributions
3. Potential Work Tasks (by interest area)
4. Potential Specific Employers (15 - 25 in preferred sequence)

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## What Works/What Doesn't

What Works	What Doesn't
Being organized	Unorganized situations
Helping in child care class	Being touched by others
Doing tasks the same way each time	Having people stand behind her
Following written or visual schedule	Working in hot settings
Reading	Taking stern correction
Lists, following directions	"Moody" days
	Losing games
	Stormy weather

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**Conditions for Employment:**

- Morning hours
- No later than 4:00 PM
- 4 - 5 hours per day
- 3 days/week during school
- 5 days/week after school
- Mon. - Fri. /1 Sat. and Sun. per month
- 15 mile radius from home
- Inside, air conditioned
- Job has routines
- Natural supports available
- Sitting for most of work
- Organized workplace that uses lists for duties

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**Interest Areas:**

- Office Work
- Food Services
- Retail Services
- \_\_\_\_\_
- \_\_\_\_\_

*This area will typically be the smallest in terms of number of characteristics listed.*

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**Contributions with descriptive example**

*Contributions: Personality Characteristics*

- Very organized (Sadie takes care of all her clothes, ironing and laundry)*
- Great memory (Sadie remembers the birthdays, meeting times and license plate renewal for all family members)*

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## Contributions

### *Contributions: Skills*

- Use Profile of Discovery, Section 5, Part II and Part III, Contributions/Discovery Mtg.

### *Contributions: Experiences*

- Worked on Senior yearbook staff, NHS
- Volunteered at church child care center
- Sorts mail for all teachers at NHS

### *Contributions: Recommendations*

- Mr. Gibson, school principal

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## 3. Development of a Task List

Use this activity to identify the types of job tasks that can be performed by the individual and that are felt to be needed in the local area, that meet the ideal characteristics. This list will become the Task List in the applicant's portfolio. List these tasks on a flip chart.

The task list from the profile is a useful resource in identifying tasks the individual wants to do.

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## Skills > Tasks

**Current Skills** refer to any work-related performance activity that the individual can currently perform without support or with support, as described.

**Potential Tasks** refer to any work-related performance activity that the individual should reasonably be expected to perform at work, with training, supports and accommodations as necessary, based on the current skills they now have.

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**Task List:** (if possible, customize to various Interest areas)

**Office**

- Shredding
- Running errands
- Delivery
- Running copier
- Filing
- Sorting, collating
- Matching checks with invoices
- Stapling
- Folding, stuffing, sealing, labeling
- Light data entry
- Faxing
- Backing up files to CD

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**Task List:** (if possible, customize to various interest areas)

**Food Service**

- Cold food prep
- Cutting
- Portioning
- Arrangement, layout
- Serving in cafeteria line
- Stocking salad bar
- Cleaning salad bar
- Condiment replenishment

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**Task List:** (if possible, customize to various interest areas)

**Retail Services**

- Folding, straightening,
- Facing Stock
- Unboxing,
- Shelving
- Hanging
- Tagging
- Installing/removing detection sensors
- Restocking of returned stock
- Inventory scanning, pricing
- Light data entry

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		<i>Employers</i>	<i>Tasks/Int. Contacts</i>
1.	<i>Natchez Public Schools</i>	<i>O</i>	<i>EJ</i>
2.	<i>Natchez Regional Hospital</i>	<i>O/F/R</i>	
3.	<i>Adams County Sheriff</i>	<i>O</i>	<i>FJ</i>
4.	<i>St. Mary's Catholic School</i>	<i>O/F</i>	<i>MW</i>
5.	<i>Circuit Clerk's office</i>	<i>O</i>	<i>EJ</i>
6.	<i>Tax Collector's office</i>	<i>O</i>	<i>EJ</i>
7.	<i>Natchez Democrat paper</i>	<i>O</i>	<i>FJ</i>
8.	<i>Bluffs &amp; Bayous paper</i>	<i>O</i>	
9.	<i>95.1 Radio</i>	<i>O</i>	<i>EJ</i>
10.	<i>B&amp;K Bank</i>	<i>O</i>	<i>FJ</i>
11.	<i>United Mississippi Bank</i>	<i>O</i>	<i>EJ</i>
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		<i>Employers</i>	<i>Tasks/Int. Contacts</i>
12.	<i>Co-Lin Community Co.</i>	<i>O</i>	<i>MW</i>
13.	<i>Entergy - Callon Oil</i>	<i>O</i>	<i>FJ</i>
14.	<i>Isle of Capri</i>	<i>O/F/R</i>	
15.	<i>Caters Dept. Store</i>	<i>R/O</i>	<i>EJ</i>
16.	<i>Belks Dept. Store</i>	<i>R/O</i>	
17.	<i>JC Penny</i>	<i>R/O</i>	
18.	<i>Stage</i>	<i>R</i>	
19.	<i>Shoe Dept.</i>	<i>R</i>	
20.	<i>Payless Shoes</i>	<i>R</i>	
21.	<i>Diane's Frame Shop</i>	<i>?</i>	<i>NT</i>
22.	<i>Bookland</i>	<i>R/O</i>	
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		<i>Employers</i>	<i>Tasks/Int. Contacts</i>
<h1>Sadie Jones</h1>			
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## Sadie is looking for a job



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## Delivering mail at NHS



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## Volunteering on the yearbook staff



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## Filing invoices at her dad's business



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## Volunteering at a Catering Service



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## Sadie's experiences

- Sorted and delivered mail at school
- Assisted in the church day care center
- Volunteered at food distribution center
- Participated on yearbook staff
- Assisted in her dad's business

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### Sadie offers the following office tasks:

- |                              |  |
|------------------------------|--|
| 1. <i>Shredding</i>          | 8. <i>Stapling</i>                             |
| 2. <i>Running errands</i>    | 9. <i>Folding, stuffing, sealing, labeling</i> |
| 3. <i>Delivery</i>           | 10. <i>Light data entry</i>                    |
| 4. <i>Running copier</i>     | 11. <i>Backing up files to CD</i>              |
| 5. <i>Filing</i>             | 12. <i>Matching checks with invoices</i>       |
| 6. <i>Sorting, collating</i> |  |
| 7. <i>Faxing</i>             |  |

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### The sales aspect of job development

Customized job development is primarily a negotiation interaction with employers that seeks to find an *intersection* between employer needs and job seeker contribution.

It is critical for job developers to utilize all *connections* that exist between job seekers and potential employers.

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### Conducting an Employer Needs/Benefits Analysis

Developing the Employer's side of the "needs template" for customizing job descriptions

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## Unbundling demand

Employers have typically met needs by bundling demands into job descriptions.

Job seekers with complex lives often don't have the "whole package" to offer.

Customized Employment allows employers to "unbundle" demand and to take advantage of discrete competencies.

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## Employer Needs Analysis

All workplaces have unmet needs, even when fully staffed, but particularly in difficult economic times



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## Employer Needs Analysis

Employers can turn each unmet need into a task.

- 1. Excess data entry
- 2. Assisting receptionist during heavy calling
- 3. Performing episodic duties: collating for meeting
- 4. Augmenting low producing employees
- 5. Relieving employees during break

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**Employer Needs Analysis**

Each unique workplace has needs

Job Developer

During Job Development, the Job Developer negotiates to perform a Needs Analysis

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**Conducting an Employer Needs Analysis**

This process can be conducted in four ways:

- As a part of individualized job development, following the tour, one employer at a time
- As a part of informational, "discovery" interviews with employers, concurrent with individualized job development
- As an effort to assist a business (larger) to adopt internal customization
- As a part of general activity in the community by job developers, family members and job seekers

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**Job based on an Informational Interview**

Identified general needs in:

- Reception
- DJs area
- Advertising
- Station manager's office

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### Episodic task: Setting up a drum set



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### Material supply: Stocking cash registers



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### Unsafe conditions: Sweeping laminate chips



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### Customers waiting: Medical Imaging



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### Chris was assisted to apply to a large managed care organization



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### Zon was employed as a result of an informal, community needs analysis done with a neighboring employer



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## The sales aspect of job development

Even though most rehabilitation professionals did not prepare themselves for a career in sales and, indeed, most would rather not make employer calls, job development is "job one" in our field.

We need to understand and play by the "rules of sales" that dictate interactions between sales personnel and employers.

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## The "Prime Directive" of successful job development

Most job developers feel it is their job to change the hearts and minds of employers. This is a basic sales blunder.

Instead of "selling" or persuading, job developers should provide information and let the employer "buy" the concept and the individual being represented.

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## A Typical Job Development Process

### Sales focused steps...

- PROSPECTING: RESEARCH AND PREPARATION
- MAKING EMPLOYER CONTACTS: GETTING IN THE DOOR
- HOLDING THE INITIAL MEETING: MAKING YOUR PITCH TO EXPLAIN CE
- FOLLOW-UP NEGOTIATIONS - MAKING THE FINAL MATCH: EMPLOYER/JOB SEEKER
- CLOSING THE DEAL



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## Getting the Appointment

Decide on the type of initial contact to use to get an appointment for a face-to-face meeting

- Third party connection
- Informal Context
- Drop-in Visit
- Telephone Contact with letter of self-referral
- E-mail Contact (only in certain cases)

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## Making your pitch: *Initial Meeting*

- Thoroughly plan for the initial meeting, focusing on fulfilling all the critical components
- Use the Concept Portfolio as a sales tool
- Develop an outline and "flow" for the meeting
- Get ready, practice for, and conduct the initial meeting



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## Cutting the deal: *Follow-up negotiations*

- Learn about and assess the company through a Tour and Needs Analysis
- Offer in-depth information about the training, facilitation and support procedures which are to be offered to the employer
- Match and negotiate the job seeker's conditions for success



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## Closing the Deal

Negotiating customized job descriptions is somewhat different than typical sales.

Traditional sales techniques call for "closing the deal" at the end of every sales session.

CE requires the development of a relationship and of an understanding between developer and employer. Job developers should attempt a "close" when it is felt the employer has sufficient information to make an informed decision about a customized job.

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