# Unlocking Potential: An Introduction to Customized Employment

JOHN WALSH: Welcome to Unlocking Potential, An Introduction to Customized Employment. My name is John Walsh. I serve as the Project Director of the Center for Innovative Training in Vocational Rehabilitation, or CIT VR. I'm located at the George Washington University. We are really pleased to co-sponsor this training with the VR technical Assistance Center for Quality Management. Customized employment is such a valuable method to match the skills and interests with job seekers with the needs of employers to develop that mutually beneficial work arrangement.

This training is going to explore some core concepts, provide examples of two state VR agencies that have implemented customized employment within their state, and provide you some additional resources to continue your learning.

First, I want to tell you a little bit about our centers. The Center for Innovative Training in Vocational Rehabilitation is funded through a US Department of Education grant. The way you can access our training resources is to go to trainvr.org. We have a plethora of on demand webinars. All the training sessions are free. All we require is a one time registration. And the vast majority of our training provides CRC continuing education hours. So that's trainvr.org.

We're also partnering with the Vocational Rehabilitation Technical Assistance Center for Quality Management. We have partnered on a number of initiatives to develop relevant training and resources to support state VR agencies, enhance their service delivery, and maximize outcomes for individuals with disabilities. The VRTAC for Quality Management really strives to assist state VR agencies achieve these outcomes through providing training and technical assistance to facilitate quality program and resource management.

The VRTAC-QM offers technical assistance, staff training, communities of practice, addressing fiscal and resource management, program and performance management, and general quality management of organizations. Please also check out their website at vrtac-qm.org. You'll be able to access all those resources.

All right. So let me now, I have the pleasure of turning this over to our presenters today. And I'm going to let them introduce themselves and take us through this really valuable training. So Patricia, I'm going to turn it over to you.

PATRICIA HENKE: Great. Thank you so much, John, for that introduction. As John mentioned, I am Patricia Henke. I'm one of your presenters today. And I work for the San Diego State University Interwork Institute. I am a Project Director there. I'm just going to give you a little bit of background about me and why this topic is so important to me.

I was doing the math, and I've had the good fortune of working in this field for 30 years, nearly 30 years of working with individuals with disabilities in employment. And throughout that entire 30 years, the focus of my career has been working on behalf of or directly with individuals with the most significant disabilities. And so what that has allowed me to do is really work in customized employment from all vantage points. I've worked as a practitioner.

I've worked as a supervisor in employment service programs. I've stood up customized employment and service provider organizations and state systems. And now, in my role at San Diego State, I'm able to really work on systems implementation in various states across the country, and also working in a couple of they're called SWTCIE projects, Subminimum Wage Transition to Competitive Integrated Employment. And this customized employment has been near and dear to my heart from early on in my career. And I feel really fortunate to have started in this area, because I do believe that it is universal to all individuals with disabilities, and we're going to be talking about that more today.

My first experience, actually, I'm going to date myself. And when I turn this over to Wendy, my colleague, I'm hoping she's going to share when she got started in customized employment too. But I started in grad school. This is late '90s in grad school. And I went to work for a service provider organization and learned about trying another way. Marc Gold & Associates model in systematic instruction.

And I'm so grateful to have started to learn that at such a young age and so young in my career, because I've carried that forward in all of my work, in all individuals that I've worked with. And so working from that lens really has created a person centered approach to service delivery, regardless of level of disability. So I'm thrilled to be here with you all today, and I'm going to turn it over to my wonderful colleague, Wendy Quarles, for her introduction.

WENDY QUARLES: Thank you, Patricia, and hello, everyone. I'm Wendy Quarles. I also work at San Diego State University. I happen to live in upstate New York, all the way across the country from where I'm employed, which gives me a neat vantage point to see work that's going on throughout the country.

And Patricia, I'm a Project Specialist at SDSU. And, Patricia, you asked that question that said, when did customized employment come into my life? And I'm going to date myself. And I have been in the field for, I was just doing the math as Patricia was talking, almost 40 years. And so some people might say, wow, that's been a long time.

But the vantage point that that 40 years has brought me and where customized employment came into my thinking is I was around when we were at first pioneering the thinking about supporting people to move from segregated settings into community based employment settings. And if you think about that, we were asking systems and families and agencies and all of the above to think a different way. And I too was inspired by the try another way and make sure that we're looking at all aspects of supporting individuals to reach the highest potential.

So customized employment in its thinking came into my life a long time ago. Customized employment as the formal model, I've had the good fortune of working throughout the RSA-funded Technical Assistance Center models from the RSFs all the way up to the TAC-QMs and QEs right now. I've had the good fortune of working to do training and technical assistance in this area to support systems, agencies, families, and individuals to work collaboratively. So, Patricia, thank you for setting the tone for us, and I'm really happy to be here to be part of this presentation and talk about the things that I believe in so heartily. Next slide.

So, John, you did a nice job in supporting what the framework for today was going to look like. We'll spend some time together understanding and exploring the core principles of customized employment. We'll also learn about the key consideration and essential elements for successful customized employment implementation, balancing that philosophy and thinking about how we move from philosophy into practice. What are the things we need to pay attention to?

We'll also share with you today tools, processes, and resources necessary to initiate and sustain customized employment at the state level. We do have two states, Kentucky and Minnesota, represented here today to talk about how they implemented customized employment in their state. So thank you. Next slide, please.

So let's start with this question. Well, what is customized employment? So if you've come to an overview of customized employment we may want to start there. And just as the title implies, customized employment is a nuanced model of employment supports that follows a distinct path to get from point A to placement.

And if I follow the bullets here, customized employment is a personalized approach to employment that tailors job responsibilities to fit the strengths, needs, and interests of individuals with disabilities while also meeting the needs of the employer. And I'm going to pause there for a minute and land on that. We are paying attention to the needs of the individual and mirroring those needs to the needs of the employer, and discovering where that happens naturally and where we may need to work to fill the gap in between those places.

Customized employment also focuses on creating a mutually beneficial work arrangement, rather than fitting a person into an existing job description. And that is that, when I talk about nuances, that is the nuance that makes customized employment different. The time we spend in discovering what an individual's skills and preferences and desires and ideal conditions are helps us navigate that relationship with a business or an employer to create the customized placement. And we're going to go into greater detail later on just how to do that. Next slide, please.

So I described those two things on the previous slide. And I am often asked, Patricia and I are often asked, wait a minute, that sounds like the supported employment that I've been doing my entire career. So when I talked about being 40 years in the field, and if you take that back in time, that's when supported employment first came to us by law and practices. And so I would always say that I was doing those things in supported employment.

And so Patricia, as I say that, what does that make you think about the difference between customized employment and supported employment? Because there is a distinct difference, both in the nuances I referred to and into the model.

PATRICIA HENKE: Absolutely, Wendy. And if I could go back to, well, it was in 2014, when the Workforce Innovation and Opportunity Act was written and launched. And that's when we started seeing customized employment in regulation. And we know that customized employment was available much earlier than that. But in terms of the VR system, vocational rehabilitation system specifically, it was at that point in regulation.

And boy, did we have some confusion around supported employment and customized employment and how are they different? How are they the same? Is it linear? In terms of if somebody enters supported employment, they have to stay on that path or can they move over to customized employment or aspects of customized employment? So there are many resources on this topic that we want to be sure to make sure that we have in our resources in this presentation to really help you think through what is the best fit for an individual.

When I think about the similarities, or I was thinking about this. I was like, if we really simplify it, it's really simple. It's not simplistic when we implement these two strategies. But we know that the goal of both of them is competitive, integrated employment in terms of the outcome that we're looking for, that it's a competitive job, it's integrated, and in the community at or above minimum wage. And we'll talk a little bit more about CIE.

We know that they're both very person centered strategies and working with individuals with most significant disabilities. And really, that they are strength based, focused on talents and skills and where individuals are motivated and really strive to look for that positive long term match where an individual is going to be successful in that employment, and that the employer is also on board with that work arrangement, as we say.

However, the approach that an employment specialist takes-- and you mentioned nuances. They're different. They're different in supported employment and customized employment. We know that supported employment focuses on the labor market needs more so than customized employment. And an individual may enter into a job that has an already existing identified job description that could be advertised, could be unadvertised, but it has already been developed by the employer to meet their needs.

And so that is a labor market driven position. We would say that that's not customized. That's more of a supported employment approach. And so that is a difference. In terms of customized employment, we are really looking for an existing job description to be modified and tailored to the individual, or even creating a completely new job description on behalf of an individual. And so I really see that as the key differences.

Also in terms of the approach, how you would approach an employer in negotiating those job duties is really a person centered, person driven approach. You're engaging an employer in a completely different way than you would in supported employment. And it's really a flexible and personalized strategy.

For state systems, the funding structures are different as well. As they should be in terms of how we're paying for services, what rates we're using, and in terms of how individuals are trained and qualified for providing the services is different in states. And I know that's an area that you have a lot of expertise in. It's kind of that training and certification components and wondering if you could share a little bit about the differences between SC and CE from a service provider or practitioner perspective and being qualified to actually provide the service.

WENDY QUARLES: Thank you, Patricia, because I was thinking, as we hear from our state representatives today, they'll probably speak to that too. The customized employment preparation for employment specialist to provide customized employment is extensive, and it's an exciting model of staff development and training that focuses on all the nuanced sections that we'll be talking about later in the training and asks for participants in that staff development and training to demonstrate the skills and receive mentoring in order to be able to do that.

Our supported employment training has been long in existence. And APSE, who we'll speak about soon and other training entities have paid attention to establishing competencies for supported employment professionals to achieve over time. That's not to say that shorter training or a longer in length training makes for a better training, but we've paid a lot of attention to making sure that we are supporting the deep, nuanced skills that make for the differences that we've just spoken about.

And, Patricia, one thing I would add to when you were talking about differences and similarities as we prepare professionals to deliver customized employment is the nuance of the discovery process. If folks have been working in supported employment, we've talked about assessment and evaluation for many years to spend that time pre-employment.

The discovery process and customized employment takes it to a whole other level. And as we describe the practices of doing the discovery process, I think that will come clear in terms of the length of time that we spend in the discovery process, the people we're engaging in the discovery process, and the stakeholders that are part of the process.

So this we could talk about for hours. And I leave this slide with asking anybody who's listening in on this training or taking this training to think about in your own system, whether you're at a CRP, a state agency, an educational setting, to think about how you understand the differences or the similarities and how those look and how we communicate those to the stakeholders in our processes. Do you have any wrap up thoughts on that, Patricia?

PATRICIA HENKE: No, I was just thinking too, we could spend a whole session just talking about this. And just wanted to share that these are just high level overview discussions on each topic. And we hope to dive deeper maybe in some future sessions. But thank you for that. It was great, Wendy.

WENDY QUARLES: Next slide, please, John.

PATRICIA HENKE: So I'm going to talk about why customized employment. Wendy talked about what it is. And we talked about the differences between customized employment and supported employment. So why are we doing it? Why do we need this new strategy to be regulated and mandated to be implemented for individuals with disabilities?

And so on the slide here is really just a quote from Catherine Inge on a research paper that was written in 2018, really starting to look at how do we define customized employment as an evidence based practice. And I just love this statement, and I think it summarizes beautifully why customized employment is important.

And it says that customized employment benefits job seekers who may have difficulty performing all essential functions of an existing job description and could otherwise be excluded from CIE when competing with job seekers without disabilities. So it really is about providing equal access, leveling the playing field, not excluding anyone from the opportunity from being employed in a competitive job.

And another reason why customized employment, or another in many reasons, is although there's been many policy initiatives prioritizing competitive, integrated employment, research still shows that our investments at various state agencies across the country do lend themselves to supporting individuals, and especially individuals with intellectual and developmental disabilities, that there's continuing emphasis on facility based and non-work activities, rather than integrated employment services or even integrated activities.

The employment rate remains very low for individuals. And in 2023, those that were on Social Security income that had cognitive impairments was the lowest rate of all people at 7.8%. And we're going to talk a little bit later about how customized employment is a universal approach.

It's not specific to one disability group or population that it can be universally applied, but it is most advantageous for individuals that haven't had the opportunity to work and haven't had the opportunity to have a strategy that really has that discovery process that Wendy talked about, and where individuals are-- you really learn about the individual, about who they are and what they're motivated to do and what they're interested in, in a very person centered, non-evaluative way and with a strength based approach.

So the why is because it's a strategy that is effective for those that we would say that typically are unemployable or have been deemed unemployable. So it makes me excited to talk about that there is this option available. There is an avenue for individuals and families that thought they could not be obtaining competitive, integrated employment, that in fact, they can. So it really is exciting to talk about and see this grow across the country, even though it was implemented back in the '90s. Or actually, it was the '70s that Marc Gold & Associates launched customized employment. So it's taking time. It has been re-envisioned over time. But we want to make sure that everyone knows about it and support the implementation.

WENDY QUARLES: And Patricia, you took the words out of my mouth at the end of your thoughts there. And I was reflecting on the gift that customized employment has given us as a field. Yes, it's been around since the '70s, but I think it took us a while to get the traction of seeing the nuance difference.

And the gift of having a model that supports both organizations, professionals and families, as you mentioned, and business communities, to see people differently, to hear the stories of successes of those negotiated job descriptions, negotiated jobs, perhaps created jobs for people we may not envisioned as working within our neighborhoods, in our communities, and in the businesses that we frequent.

So I consider it a gift, and I love when we spend time talking about success stories and helping those get out to answer this question to the world why customized employment. It's an important model. So thank you for your thoughts on that.

PATRICIA HENKE: Oh, absolutely. Thank you. Let's go to the next slide. So I can't really talk about customized employment without talking about employment first as well. And so employment first is a growing movement and an exciting movement in our country. And it's a belief and a value that all people, regardless of their level of disability, are capable of full inclusion and working in competitive, integrated employment.

And this movement has grown so much. Wendy talked about APSE, which is the National Association for Persons Supporting Employment First. And on APSE's website, there's a plethora of employment first information, as well as the Office of Disability Employment Policy, ODEP, which both of those websites are in our resource links.

But to date, and this is exciting information if you're not close to this, but 31 states have passed employment first legislation. So 31 states have prioritized this employment first foundation, this employment first value. 16 states have employment first executive orders, and 32 states have state agency administrative policies or regulations. That's incredible to have that much growth in employment first. And really employment first paves the way or aligns with or has so much synergy and cohesion with the concept of customized employment. Let's go to the next slide.

And so they go hand in hand. And so if you are a state that has these employment first initiatives, or even if you're not, you can really couch customized employment under the employment first foundation if you're needing some type of connection to the two for implementing it in your state. And employment first really does work towards those systems change models, really shifting mindsets and challenging mindsets of those that can't see individuals with significant disabilities being employable. It also supports shifting the policies and the service delivery practices and funding structures that really do increase the opportunities for individuals to go to work and those with significant disabilities.

And, Wendy, I know that you're very involved in the APSE community in your state and have been for years. And I've been involved in APSE as well in my state. I actually am in Colorado. But I am curious to hear from your perspective and your just deep involvement in APSE, how you have seen this movement grow and if you see any alignment with customized employment as well?

WENDY QUARLES: Well, absolutely. And I can even think of the fact that APSE itself transitioned its name from the Association of Persons Supporting-- was the original title Association of Persons Supporting--

PATRICIA HENKE: Support employment.

WENDY QUARLES: Yes, I guess.

PATRICIA HENKE: Support employment. Yeah.

WENDY QUARLES: I'm sorry I tripped over that. To the name where we're the Association Supporting People in Employment First. And I love the fact that you mentioned as an entity that pays attention to what's happening in the whole country. And if you go to APSE and take a look at, there's a resource on the site that features a map that if you yourself, as you listen to this, aren't familiar with what's happening in your state, to take a look at that.

The nuance that employment first believes that all persons should be considered for employment first, as opposed to segregated and day options, has really fed the fuel in my state here and nationally about considering options that will work for people. So I think that's a natural fit for customized employment. That customized employment is the model that challenges us at the systems level and at the practitioner level to do work differently.

And now that we know better, that when we consider employment as being a first option, we work better and customize employment for it creates that framework in order for us to work better on behalf of individuals with disabilities. So I'm proud at our state level in New York at the work that we've done to create the movement towards employment first. But I'm also proud as a country that we are standing up for believing in employment first and creating more information about models that support that. And customized employment is one of those models.

PATRICIA HENKE: Absolutely. And I just wanted to add that it takes time.

WENDY QUARLES: Yes, it does.

PATRICIA HENKE: To shift culture. And if we look at all of those states that have implemented legislation and executive orders and policies and procedures, I would bet that they are all at different phases of implementation, different phases of shifting culture in their state and mindsets. And that is OK. It's a journey and it takes time and commitment and passion and really stick-to-itiveness is a term I think of, a resiliency of really staying true to the mission of it.

But just know that it takes time. Employment first is not a training that you attend and you learn about it and you go do it. It's really a process and a journey. And so those of you that are listening just want our audience to take that away. Don't expect that it's just going to happen overnight, because we know that it can be a process. But we're here to support you.

WENDY QUARLES: And Patricia, I often think of science and art in the work that we do. So when we talk about evidence based practices and models and some of the systems change, that becomes the science of the work we do. We're adding in the nuances of the art of creating it. And I think you're speaking to the it takes time.

The communities of practice that we mentioned earlier as being part of the structure of the VRTAC-QM, that has presented an opportunity for people across the country to come together and talk about where their states are in the employment first journey, and how customized employment has fit into their state's activities related to employment first. So just a plug for getting involved in national communities of practice, whatever topic it may be, to have the opportunity to see how other colleagues across the nation are doing their work.

PATRICIA HENKE: Absolutely. Next slide. All right. So we've been talking about customized employment in the journey of implementation and dates and timelines and when things have started and how they evolved. And so we wanted to take a minute to talk about customized employment and also the journey with SDSU at Interwork Institute and our engagement and involvement in customized employment.

So this starts with 2002, which when customized employment was initially defined in the Federal Register, we did mention how customized employment started in the '70s with Marc Gold & Associates, who really launched it, was the pioneer in the work. And so I'm just highlighting that there were many states and organizations and schools that were already implementing customized employment strategies years, decades before it was defined in the Federal Register.

But then if you move forward into the next five years, ODEP, the Office of Disability Employment Policy, funded demonstration grants for customized employment across the country. So that's when there was federal money that was being put towards it to really implement. And how do we stand this up in states and make this a viable option for individuals with significant disabilities?

Moving forward to 2011, and this is an amazing resource as well that we have available for you in this presentation, with ODEP created the customized employment competency model. And so this document describes the characteristics of a successful customized employment specialist or an employment specialist that's emphasizing and customized employment. Because it does require thinking about skill sets and what's going to set an individual up for success in this type of work. So that model talks about all those competencies when you're hiring someone to think about when you're building your team or you're implementing customized employment.

So then in 2014, we know WIOA codified customized employment in law. And then it was the second definition that was published in the Federal Register. And that's really when vocational rehabilitation agencies were mandated to implement customized employment and really started those projects or those opportunities to get support in doing that really started in 2016 when the Workforce Innovation National Technical Assistance Center was launched, which was at SDSU. SDSU had the good fortune of doing that technical assistance until 2020.

And that's actually when I started implementing customized employment in Colorado. I was in a role with Colorado Vocational Rehabilitation, and we needed help to start customized employment. Where do we start? And so I accessed the technical assistance at SDSU at the time to really help me in bringing partners together. And when I say partners, I mean our Medicaid partners, our education partners, behavioral health, and so forth, and our service provider community to really help inform building that program.

It also was when the essential elements for customized employment were developed and made available. It was actually 2017 those were published. And then the customized employment community of practice launched as well. And Wendy was a lead and co-lead on launching that COP. And we still have that going today. Which I have here, 2020 to present, still have our COP with 25 states that are attending. It's a very active, collaborative group.

We're doing that under the VRTAC-QM grant that we're working under. But we are committed to continuing this COP even beyond the grant cycle. It's just too important and such an amazing group of professionals that are really actually going to, in my opinion, are shaping CE implementation. So we're certainly going to continue that.

And then also with San Diego State University, we are involved with five SWTCIE grants. And SWTCIE is the Subminimum Wage Transition to Competitive Integrated Employment. And in those five grants, we are working on customized employment implementation. So we're really positioned nicely to have a lot of information and data and research and learning. What is really working and what's not? And what are the foundational principles that we can land on for implementation? Really identifying where the pain points are, and coming up with solutions and ideas of strategies to mitigate those, to really get the service available to individuals that are looking for it and families that are really wanting it.

So I have to pause, because I know Wendy. I can see when Wendy is ready to say something, because her face lights up when we talk about the COP and WINTAC, because Wendy was a part of that grant and that work. I'm going to go ahead and take the mic, Wendy, and share what's on your mind.

WENDY QUARLES: Am that obvious, Patricia? It's so funny. And thank you. When you say lighting up, I think when I mentioned it a while back, what a gift being involved in paying attention to this at a national level. And when you were talking about that phase in 2016 to '20, we had pilot projects as part of the WINTAC Technical Assistance Center, working with 14 pioneering states, putting together all of the elements of customized employment in their states and having successes and learning a lot together. So it made me remember that.

And the other thing that I realized wasn't on our chart, but I wanted to mention, is you talked about the ODEP competencies in 2011. ACRE, the Association for Community Rehabilitation Educators, has been working hand in hand, both with professionals at ODEP, professionals at APSE, and professionals at institutes of higher education to consider the competencies, the things that professionals in the field need to know. And from 2007 to now, we have been taking time to create and revise and renovate those list of competencies.

So I encourage you to look at the ACRE competencies, for those of you who are not familiar. We do know that some of the states that are part of our COP, as well as states that are delivering customized employments, require the ACRE credential curricula to be offered as training. So more to follow on that topic. So thank you, Patricia.

PATRICIA HENKE: Next slide. I'm going to turn it over to you Wendy.

WENDY QUARLES: Oh, hi. It's me again. So I'll just keep talking. Thank you Patricia for describing that timeline. It leads us to me wanting to talk about a document that was created in 2017. With the 2014 Workforce Innovation and Opportunity Act, known as WIOA, as customized employment was featured in that act, we found it necessary to pull together experts in the field to create a document that really spoke to the essential elements.

What are the things we need to be sure are focused on in our delivery, our systems, attention to systems change, and attention to outcomes? What were going to be the essential elements. So the WINTAC and Y-TAC, the Youth Technical Assistance Center, pulled together partners from Griffin-Hammis, Transcend Incorporated, Marc Gold & Associates, and Virginia Commonwealth University to take a stab at creating this 12 page document.

And I'll hold it up, because it's something that I find near and dear to my heart. And it was adopted and recognized as the essential elements that we are asking practitioners to follow universally across the nation if they are adopting and delivering customized employment services. So the purpose of the document is to serve as the guide for said universal application and to help us gain consistency across the nation as we deliver customized employment.

And Patricia, when you talked about in Colorado, being one of those pilot projects and seeking technical assistance from the WINTAC, can you describe how maybe you use the essential elements or how it is played into your excellence as a practitioner when you were in that role?

PATRICIA HENKE: Absolutely. So I think it was 2019 specifically when we received the technical assistance. So the essential elements document had been published for a couple years at that time. I think what was really helpful and actually what was intended for was to have a document that shared consistent training strategies. This tool, in my opinion, really brought some continuity to those strategies, which was incredibly helpful.

And also the aspect of knowing how to incorporate mentoring into the customized employment training process. Once an individual is actually applying what they're learning, how do they get that hands on mentoring and what should that look like in terms of really being able to fully implement the practice to integrity, to quality, to a level of efficacy. And I have it on my desk too, Wendy. And so I reference it frequently.

And it's still a living, breathing document. I know that we have had conversations about freshening the document or revisiting it in our current times and if anything needs to be modified. And then also looking at a 2.0 per se document in terms of implementation strategies, because I think that in itself has a lot of nuance but also a lot of opportunity for bringing things that we've learned together to help new states with implementation.

WENDY QUARLES: I'm so glad you mention that, because the thing that I love about this is that act of creating the document, the act of using the document from 2017 to now has also begat a number of other subdocuments. Roadmaps, frameworks, checklists, many of which you'll find on the resource that we list, were created under the WINTAC. So take a peek at that on the resource slides at some of the documents that were born out of the essential elements. And so next slide, John.

And I won't spend long on this at all. But the essential elements document is 12 pages long. Big font. It's an easy read and it's a great read because it does exactly what Patricia just described. It helps us gain consistency in our practices and answer some of the questions we may have going into this. But the document itself breaks into four sections. An overview of the essential elements and some of the assumptions and philosophical and literal things that need to be in place if we're going to deliver customized employment.

The second section is conducting discovery and creating discovery documents. And as we spoke of earlier, and Patricia will go into deeper detail, is what the differences are and what needs to be in place when you're conducting the discovery phase of customized employment and how you take that information from the discovery phase and create the discovery documents that will lend to section three, which is the planning for the customized employment.

How do we facilitate the planning meeting that takes all of the information we've gathered such, and support the individual in facilitating the planning meeting that will lead to the activities and actions that will take place in the final phase of the document, which is the employment, development, and representation. We found out in phase three what the ideal conditions for employment are and all the factors that will contribute to success. And how are we going to take that information, identify the job tasks that the person is excellent at, and who it is that we are going to reach out for and negotiate jobs, whether it's creating jobs, whether it's taking a look at existing jobs and creating and adapting those jobs.

And so I love that document for all of those pieces to give us the roadmap, the checklist, the things to think about. And I've suggested to groups of people that are continuing customized employment, are struggling with customized employment implementation to go back to this document and use page by page, point by point. How are we doing in each of these? Where do we need to beef it up, change it, get additional training or enhance our practices? So that's why I love the essential elements document. Anything you want to add, Patricia, before we move on?

PATRICIA HENKE: No, I think in the next slide--

WENDY QUARLES: Right, next slide, please.

PATRICIA HENKE: And we're going to talk about just some key considerations from the essential elements document. As Wendy mentioned, it's several pages. So we're not going to have time to go over all of it today. And some of the areas we've already talked about in previous slides. We've talked about that customized employment must meet the WIOA criteria for competitive integrated employment. And then we have a few bullets here that define the criteria for customized employment.

So we know that means that work can be full time or part time. And it can even include self-employment. And there actually is customized self-employment is actually an option for individuals as well. So that does meet the WIOA CIE criteria.

So just as a quick refresher, I know probably most of us know this by heart, but it's always good to remind us that CIE is paid at above minimum wage and not less than the customary rate paid by employers to individuals with similar skills, training, and experience performing the same duties as individuals without disabilities.

It's required for individuals to have the same level of benefits at their job site with their employer as anyone else, that they're working at a location that is with and integrated and alongside others without disabilities, and that you're offered opportunities for advancement. We want employment to be a career pathway, that you're not stuck in one job for life. That you want to advance, if you want to even have a lateral switch in employment, that you have the opportunity to do that.

And then the other piece, we talked about the negotiation of job duties for customized employment. And that actually yields a new job description, whether it's modification of an existing job description or a new one. But that is a key consideration for customized employment and goes into deeper content in the essential elements document.

Let's go to the next slide. And we're going to talk about the person driven practices that are in the essential elements document. So we've talked about employment first foundation in terms of the premise or the presumption that all individuals are employable with the right supports and the right job match. That is going to set everybody up for success.

My all time favorite aspect of customized employment is this no qualitative, no fail process. Like I said, that presumes all individuals can work through the person centered, non-evaluative approach of discovery. And so it is approaching working with an individual that you can be successful in employment. We're not going to evaluate you or do standardized assessments and tests to make you demonstrate that you can work to be eligible for employment services.

We are going to work with you and learn what you're motivated to do, what you're interested in doing, where you thrive. And we're going to build and also look at things that don't help you thrive, the conditions around you that may not yield success. But we're going to take all of that information and work from a person centered, strength based approach to finding a customized job.

And we've also already mentioned in terms of its being an individualized approach, this is one job for one person. There's a job development representative that's working with the individual, their customized employment specialist, and that the employment, whether it's wage employment with an employer or self-employment, is chosen by the job seeker and also is a negotiated and a positive work arrangement with the employer very much involved with the negotiation of those job duties. Let's go to the next slide.

So a little bit about discovery. Again, we could spend a lot of time just on discovery. But this is just a high level overview of what the discovery process can support and really what's required in terms of really being effective in discovery. And so it requires letting go of assumptions and labels.

So when you think about, oh, I'm not sure if this person can work or you have to let that go and just have an open mind, not have a predicted outcome. Don't try to anticipate the outcome. We often do that where we're trying to, oh, I think this person would be good at this or be good at that. You have to let go of all of that and just be present in the moment with individuals and meet them where they are, and let that evolve naturally as you're working with them and to let that emerge. That's hard to do. It can be hard in our minds sometimes of just being organic with an individual and to let that emerge.

As I mentioned before, it strives to view the employment seeker descriptively rather than evaluatively. And also from an optimistic perspective. We are optimistic and hopeful, and we are going to identify what's going to be a good fit for you in employment. Again, it helps uncover the talents, the abilities, the capabilities, and the conditions for success, as I mentioned.

And this is another favorite of mine is that it also provides an opportunity for employment for individuals that may be perceived or labeled as unemployable. So it really can challenge our belief systems and our values of what we've thought work means for people. And it does create growth opportunity in terms of learning and to see what's possible. Let's go to the next slide.

WENDY QUARLES: So Patricia, your last comment there reminds me. And we put this slide in because we wanted to make sure to remind everybody who's listening in that customized employment historically, and I'll go to the second bullet, was thought of as being a model designed only for persons with intellectual and developmental disabilities. I think that when people think of that, that's the place where they go.

However, customized employment is designed to be a universal model to support employment processes for individuals with all types of disabilities. And we've had some innovative examples of organizations and disability groups for whom customized employment has been successful.

And, Patricia, as you just talked about discovery, I think the key for me when I think about universality of the model is that discovery process begins to help us think differently, that last bullet about the employability of persons or disability types that may have been previously seen as unemployable or less employable, that changes the way that all of the stakeholders in the process begin to see employment and begin to see the possibilities.

And so when I think of the universal model, and next slide, please, John, it reminds me that if we're going to have successful implementation and have all those beliefs that we get going in all the pre-phases and discovery phases, that it does take a proverbial village to make this successful. And Patricia, I'll toss it back to you to talk about that nuance. As we change our thinking, it really does require us to pull people in to successfully implement.

PATRICIA HENKE: Absolutely. And this slide just illustrates that all the individuals and partners that really do need to be at the table supporting the customized employment candidate who is at the center of this process. But individuals that are your state agency representatives, that can be counselors, that can be vocational rehabilitation techs, it can be your service coordinators with Medicaid, it could be your transition specialist from Department of Education.

And typically those individuals are in a funding role where they're funding a service. But I encourage you to look beyond the funding, that these are individuals that may hopefully have some knowledge on customized employment and maybe even in employer engagement and can really support the process for an individual seeking customized employment. We want friends and family, individuals that are important to and know the individual that can help inform the discovery process as well. And those that are where the CE candidate trusts them. They are going to be supported throughout the process with whoever they want to be at the table.

Clearly, the business community and the employment specialist, who we know is at the heart of actually working directly with the individual. But partnering, collaborating, having whether you call it a CE implementation team or a CE person centered team, it's really an integrated resource team as well. But having as many people at the table that is necessary to support an individual moving through the entire process is really important.

It's critical, and it's a way to leverage all of the knowledge of everyone to really get to an individual to an employment outcome. And this really is modeled for an individual when they're in services. But this also can be modeled at the state level too, and at the district level in terms of partnership and collaboration. Customized employment does require partnering in a different way and thinking about partnering in a different way. And so being open to that is really critical for success and customized employment. Next slide.

WENDY QUARLES: And Patricia, just before we go on, and it fits with this slide too, is as you think about the partners in the process and what it's going to take to implement. Who are the partners that are missing from the table? We gave you a list of people in that image, but as you began to talk, I began to think, who's missing? What community representatives, what education representatives? So we challenge us as we think about the essential elements and implementing customized employment who does need to be at the discussions.

PATRICIA HENKE: So we've been talking about the customized employment essential elements and the implementation of the service delivery. And Wendy shared a lot about that document. And we've talked about a potential 2.0 document. And this slide represents what we would be thinking about in terms of including in that. And it's really about the systems implementation. We're learning a lot about or we have been learning a lot over many, many years from states that have been implementing customized employment of what is really necessary to stand up the customized employment model effectively.

And so on the screen here, there's six buckets that illustrate the areas that we are seeing emerge to the top. We're not saying that there aren't others, but for now, we're looking at vision, there being leadership around CE in the state and a strategy for sustainability. An active model for communication, internally and externally with stakeholders. Really looking at your quality assurance with data tracking and evaluation to help inform your progress.

And if you need to pivot, you're revisiting your policies and your procedures and your funding. And is that inclusive of employment first and customized employment language and strategies? We already touched a little bit on service provider capacity and system capacity with training and really implementing this work. And lastly, I'll just mention the importance of referrals and your service delivery design that in order to maintain engagement, so from a service provider organization, it is critical that you have ongoing referrals occurring so that the service remains active and it just doesn't fall by the wayside.

So we are so fortunate to actually have some state partners here with us to share their experiences. And I'm going to turn it over to you, Wendy, to introduce our guests.

WENDY QUARLES: Absolutely. And I titled this slide Customized Employment Works with an emphasis. And I'm delighted to introduce you to two national partners that we have. And when I say national partners, they've been engaged in our national community of practice for a number of years, sharing their successes, their stories, their reflections on the path to get to those successes. And we're just delighted.

So I will introduce both of them and ask them to speak a little bit more about themselves. But we have with us Ron O'Hair from the Kentucky Office of Vocational Rehabilitation and Margie Webb from the Minnesota Department of Employment and Economic Development Vocational Rehabilitation. Margie, I think you were going to talk to us first about how you've made things successful and made things work in the state of Minnesota. So thanks for being with us today.

MARGIE WEBB: Hello, I'm Margie Webb, and I am the Customized Employment Specialist for Minnesota Vocational Rehabilitation Services. And I'll talk a little bit about what that entails in my role. But we have been on this journey of implementation for customized employment for many years.

When WIOA was signed into law in 2014, we as a state said, OK, how are we going to implement this? And so in 2015, we started a pilot project in one of our metropolitan areas with a provider figuring out how are we going to sequence, blend, and braid funding? How are we going to bring our partners in? State services for the blind, our education partners, our Medicaid partners, and create a model and a system that can work for us.

So in the initial phases, in 2016, we brought in Marc Gold & Associates to the state of Minnesota. We had them complete three training cohorts in discovery, job development, and systematic instruction. And that lasted about two years, maybe a little more than two. And one of the things we realized early on is that that model was not sustainable. It was taking a long time to get people certified. We put about 160 people through that training. That was both individuals in our VR program, as well as people working in organizations, our vendors across the state of Minnesota.

And so through that process, we began to develop our own curriculum. What could we do that would be sustainable, cost effective, and that would work on a long term basis? And so many people, we got together with about 10 people. We combined or partnered with our Medicaid, Department of Human Services in Minnesota agency, our state services for the blind, and our vocational rehabilitation. And we came together and started putting together a training program and model, and we based it off those essential elements that were spoken about earlier.

How could we do that? We got a lot of help and support from WINTAC at that time. And we spent about eight months doing that, and that was the 10 of us in a room every week working on the curriculum development. We finally had a final product in the fall of 2018, and we began to roll out training.

With that support, we submitted our training program to ACRE and got ACRE approval. So any participants of our training would receive that ACRE certificate in the basic employment services, with that emphasis in customized employment. And I believe we may have been one of the first states to submit curriculum specifically in regard to customized employment.

Since that time, we began our training. And we've had at least two cohorts a year of training. So we would typically do a spring and a fall. And we allowed anywhere from 30 to 60 people to join that. That training was going along great. It was in person. We were doing one in the metro area. We were doing one outstate Minnesota. We would move it around from the northern part of the state to the southern part of the state.

Until that lovely pandemic hit. That stopped our in-person, and we converted the training to a virtual format. During the pandemic, we also had time to focus on training some of our education systems, teachers, and educators on implementing customized employment techniques and strategies. They weren't implementing the entire process, but how could we do that in our schools?

So since that time, fast forward to now, we have trained 17 cohorts. We have trained about 585 people. And I will say that some of those individuals are from other states. We've trained people from Wisconsin, Montana, New York, Iowa, and some other states.

But what does that look like for outcomes? On any given day in our state, we have about 140 to 145 practitioners. There is a lot of turnover in this field. That affects us. And we still need discovery and customized employment job development services throughout our state. So we're going to continue that training at that rate.

Some of the outcomes, that's another topic that people are really interested in. The average age that we're serving in customized employment is 28 years. Our median wage is 14.49 an hour, and about 46% of people who enter a discovery process or the customized employment process in Minnesota are obtaining competitive integrated employment. And that is across either self-employment or individualized employment at a specific business.

The average amount of time it takes to get through that first step of discovery, we're at about 18.4 weeks, which is roughly, what, four months? We would like to see that at 8 to 10 weeks, and it is gradually decreasing. But that's one of our goals.

Provider rates in Minnesota. We have providers that contract with our VR program. VR is the primary funder of customized employment services at this time. However, Medicaid does fund some of those services. Depends on a lot of factors. But we're getting teams together and saying what seems to make the most sense in this area, who's available, and how can we proceed with that? In Minnesota, our rates are hourly rates, and they run anywhere from $75 to 125 an hour. Our providers do alter and amend their contracts annually, though.

So what was some of the investment in this? Well, it was creating my position. So that was a full time FTE in our VR program. I complete the training. I provide mentorship. We know that mentorship is so important. This is a really tough, challenging service. And so we have determined that that mentorship piece is critical. And so I provide the mentorship to people in our training to have some of that consistency.

In Minnesota, if you want to be a vendor of customized employment services, you must take a 40 hour training program through ACRE and get that ACRE certification and complete that mentorship. So I review everyone's first plan and then their marketing materials to say yes. They align with those core and essential elements of customized employment. They become an approved practitioner, and they go on our state wide list as someone we can contract and work with.

And our DHS or our Medicaid partner has my co-trainer. Because there are two of us that train and provide mentorship. And that's about a 1/3 FTE. We both work on curriculum development. We both are providers and practitioners of customized employment through all phases and steps of that. And we both do a lot of consulting in our respective programs.

And I think I'll stop with that. But that is some of our key pieces of how we implemented where we're at, and we're still on that journey. There are still some waitlists for customized employment services. So we will continue that. But I feel like we have a pretty stable handle on it. It's been fairly consistent. But it's been that mentoring and having our training and then having the supports, that nationwide community of practice, and then just that consistency in the training and mentorship support. Thank you.

WENDY QUARLES: Margie, wow. We couldn't have said it any better. And thank you. Your work that you've done in your state and the contributions you've made to other professionals across the country by you participating in our community of practice. I know that people from other states have reached out to you. Margie's email address is on this slide.

And I don't want to put more work on your plate, but she has been willing to speak to folks from across the nation, so be sure to reach out and learn more about the work that Margie is doing. And thank you for taking time to be with us today. Ron, I'm going to toss it to you now. And let's hear about what's happening in Kentucky that's been successful and how customized employment is working in Kentucky.

RON O'HAIR: Well, thank you, Wendy. I greatly appreciate that. And good morning. I think it's still morning. So good morning. Yeah, so I'm Ron O'Hair. I'm the Community Rehabilitation Program Branch Manager with the Kentucky Office of Vocational Rehabilitation. I've been around VR for, well, I think this is year 27. So I was a counselor for 16 years.

And actually prior to that, I actually was a supported employment provider. So I have a pretty extensive history in support employment and customized employment. So when in 2014, I became a consultant within the CRP branch. And I will say this because we were doing customized employment when I came on board as a consultant with the CRP branch. And after three years of that, I became the manager of this program.

So one of the things that really helps us make sure that we have successful customized employment here in Kentucky is from the top down, we have buy in, first of all. So we are an employment first state. And it also helps that the chair of the Employment First Council also works with the University of Kentucky, with whom we have a contract with. So we're at the table. We're at the table with the Department of Behavioral Health and these other partner agencies that we can talk about these things and come together in terms of having a like mind in terms of customized employment.

So with the Employment First Council, we're able to spread that word. We're able to talk to other partners and make customized employment something that is known. There's many times individuals do not know about customized employment and what that really means. So it's important that we have that relationship there. It's extremely crucial.

I mentioned the University of Kentucky. We've had, for as long as I can remember, a contract with the University of Kentucky. And what they do through that contract is they provide the core training for all of our employment specialists throughout the state. And customized employment is always a part of that training.

Now, in addition to that, we are fortunate enough that one of the trainers through that contract had a strong, and still does, a strong relationship with Marc Gold & Associates. So through that contract, we were able to create another component within the contract called the leadership series. So what we were able to do is to offer the MG&A training model, which we had a pretty good system set up.

So we were able to have that trainer do the mentoring, do all the setup, and provide all the training necessary for those CRPs and employment specialists that were participating. And we've had multiple CRPs come throughout the years, and many employment specialists who have participated in the various gateways. And as you know, the three certifications with discovery, job development, and systematic instruction.

Now, although that was a pretty good system, I mean, we had a pretty good flow. I would say it was a trickle. I mean, we had a steady flow of employment specialists coming through and being trained and we're able to offer this service throughout the state and continuing to promote that. There's just turnover. As Margie had indicated in her talk, there's turnover.

There were sustainability issues that we were really having to look at more closely. Why were we losing providers? And obviously, some employment specialists moved on to other jobs and they take that certification with them. So it was a cycle. Although it's successful, beneficial, what we found is we needed to do more.

So one of the things that we were able to implement when I became manager is that we created seven establishment projects. They're contracts whereby we had to go through the Rehabilitation Services Administration, RSA, to get approval for these contracts to help agencies become established to provide customized employment. That initial startup cost can be pretty extensive for agencies. So we were able to tap into those establishment project opportunities and help agencies get established. And we currently still have a few of those in existence now that we're looking to phase out in a few years. So those have been successful to help us continue to expand customized employment throughout Kentucky.

So in addition to that, one of the things we make sure that we have within our system is that we have the ongoing need for continuing education units. So we built into our policy and our expectation with our employment specialists that they will be required to have 15 hours of CEUs annually. And again, I know the certifications, they have to keep those up to date too. But we ensure that even if someone doesn't go through the certification process, we still require that there are CEUs that they have to meet annually with customized employment being a part of that.

Now, still, as we explore further, that's where we've been over the years. And we're still in that mode right now. But we're in a transition period. And as I mentioned before, we had a fortune enough to have a UK employee who had a working relationship with Marc Gold & Associates. That person has since retired. So it's like, uh oh. We kind of had all of our eggs in one basket. So now we're challenged with what do we do now? So although that's still an option to participate in training through MG&A, we're currently in the process of exploring other alternatives.

So one of the things that we've done is we applied for a grant through the Department of Labor with the Office of Disability and Employment Policy. And the grant is NEON, the National Expansion of Employment Opportunities. So what we're doing through that is we're allocating so many hours to help develop what Margie was talking about, which I love, is that they've got their own built in system within Minnesota.

So that's currently what we're working on now through NEON. We're just getting this going. So we're going to be working on those things that you're talking about. And the information that you're providing in this training so, so important with those essential elements and customized employment. So we're going to be looking at and developing and making sure that the training that we have built within our structure has all those core elements.

And what we've been able to do, I'm big on contracts. You're going to get that trend through this and see that that's a big part of what we do. So I looked at the existing contract that we have with UK and talked with the administrator of that contract. And so we explored how can we further expand this relationship to encompass more services around and support around customized employment.

So what we've built into that was the ability to bring on more staff. One of the staff actually has the MG&A certifications, although that's not what that's not what we're going to center it all around. So we're going to have more of a encompassing and more of that view of the core elements, those essential elements that we want to make sure we touch on everything. And we don't just pigeonhole the training.

So we've got staff in place that can provide this ongoing training. So we're going to expand what we're doing in terms of customized employment. And we're going to ensure that every employment specialist that comes through this training that the customized employment piece is going to be a much broader experience, and they're going to have a much stronger and solid foundation with customized employment. So we're really, really excited about where we are with that initiative, through that contract. So we're just getting off the ground with it. So we're really, really excited about it.

One of the big things that we've done recently, we worked on this for quite a while, is the development of new rates for our CRPs who are providing customized employment. So we've gone to a hybrid model, if you will. So we do pay by the hour, but we also have payments set up for outcomes as well.

And one of the issues that we ran into was the sustainability part had to do with just being outcome based. People weren't getting paid for services that they were providing if a specific outcome wasn't met. So we did a lot of surveys. We did a lot of study into what those issues were. So we made sure we got good feedback from those CRPs. We communicated with our own internal staff and our external partners to identify what are these issues and how can we better attack that?

So one of the things that we did was we really expanded what we pay. And it's pretty extensive, I'll say. So from that, I'll give you a perfect example just from the implementation of these rates. We've had 16 new providers come on just since October the 1st. So we're seeing at least, so far, we're seeing a huge increase in those agencies that are interested in providing the service. So we're really, really excited about that.

So one of the things that we're going to be doing moving forward, again, I think we're looking at 120 hours of support from the National Expansion of Employment Opportunities network. We're working with a subject matter expert that's going to help work with us and get everything where we want it to be. The information you guys are providing is going to be spot on in helping us get there.

If I'm looking back and I'm thinking about the things that really have helped us be sustainable for a long period of time, even though it wasn't-- we didn't get where we wanted to be fully, but we were still able to provide customized employment services over a period of time. That's huge. There's still a need in other parts of the state, and we still have a need for providers. But I think as we've had some time to really think about the vision for where we want to go, what that's going to take to be successful. I think we have a really good start on that. But we have a good foundation with which to start because of where we've been, the experiences that we've had.

So the things that really stand out to me are those establishment contracts, been extremely helpful. Our relationship with the University of Kentucky's Human Development Institute, having the backing from our own internal leadership within OBR, huge. They're very supportive of the things that we do centered around customized employment and as well as the Employment First Council. The relationship we have with other partners as well, all of those things are really key in helping us get where we want to be. Because I'm not sure we'll ever get there, just because I think there's always ways to improve. There's always things to do things better. We're always learning and trying to improve.

So that's just a brief overview of where we are and the things that we've done. And hopefully you'll find that helpful. So thank you.

WENDY QUARLES: Oh, indeed, Ron. I had the same reaction I had to Margie's. Thank you. We wanted to invite both of you to this presentation for exactly what you've conveyed to us the messages, the feelings, the lessons learned. So thank you so much for spending time to both you and Margie today. Next slide, please.

And we will bring our discussion for today to an end shortly. We have two slides that feature resources to get started in your state. So Patricia, you did that great review of those six blocks of implementation. And these are more resources to support you in that implementation. I won't go through them. They're on the slide. They're live links that take you to many of the documents and organizations that we mentioned. Next slide, please, John.

And Additionally, more resources to get you started in your state. I will encourage you also to get you started in your state to reach out to both Ron and Margie, who have had journeys from different directions but arriving at the same place.

And last but not least, next slide. Thank you. Thank you so much for being part of this discussion today. Thank you, John, and the folks at CIT for supporting the partnership of the delivery of this training, VRTAC-QM, of which Patricia and I are employed at San Diego State University. And Patricia, do you have any wrap up thoughts before we sign off today?

PATRICIA HENKE: Well, I just wanted to say thank you, Wendy. It's always a pleasure. And thank you, John. Reflecting on Ron and Margie speaking that they illustrated that it's a journey. We were talking about it's a journey. And they have demonstrated the stick-to-itiveness and the resilience in implementing customized employment and have made adaptations and modifications and are still very engaged, in our COP and in the conversation.

And I hope that illustrates to other states that it's not an exact science and you have to implement a lot of art. You were mentioning that too, Wendy. And we hope to continue to prepare and provide more resources and more training and technical assistance in this area. Thank you.

WENDY QUARLES: And thank you. I would say ditto.

JOHN WALSH: I want to thank you both for putting together this dynamic presentation, and also having Ron and Margie join us about the work they're doing in their state to really foster an employment First Mindset and also put practices into place to get better outcomes for individuals with disabilities.

CIT VR greatly values our partnership with the VR-TAC for quality management, and certainly want to acknowledge that these projects were funded via grant funds from the US Department of Education. So we appreciate that partnership as well. Thank you for joining us today. Be well.