

Customized Employment (CE),
Supported Employment (SE), &
Integrated Resource Teams (IRT)

Center for Innovative Training in Vocational Rehabilitation (CIT-VR)



- Developing innovative methods to train VR personnel in their work at State Vocational Rehabilitation agencies to deliver services to improve employment outcomes for individuals with disabilities.
- VR 101 Training Cohort
- Communities of Practice
- Webinars
- Training Resources
- Training Needs Surveys
- Online community:
<https://trainvr.ning.com/>

VRTAC-QM

VRTRAC-QM Mission

Partnering with SVRAs to enhance service delivery and maximize outcomes through quality program and resource management.

- Three primary areas of TA
 - Resource/Fiscal Quality Management
 - Program/Performance Quality Management
 - **Systems Thinking**
 - General Quality Management

Presentation Objectives



- Provide Overview of Systems Approach to
 - Customized Employment
 - Supported Employment
 - Integrated Resource Teams
- Present tools and resources

Features of Systems Thinking



- Systems thinking and design is a management approach that VR leadership can utilize to promote cross-agency collaboration to optimize limited resources
- Offers a holistic, deliberate approach to examine how inter-related public and social systems work in concert to get the outcomes
- Fosters a shared understanding of each agency's role in an employment outcome
- Creates a “road map” for leadership within each agency to manage change and support cross-agency services alignment

Systems Thinking Features (cont'd)



- Systems thinking and design is an approach that can help state agencies take a comprehensive, collaborative approach to forging a cross-agency vision for an employment system for people with disabilities that helps states meet requirements under WIOA and move toward Employment First Initiatives
- Gives VR and agency partners a structured approach examining how employment services and supports can align more effectively to improve outcomes across multiple agencies.
- Provides for more effective delivery of services through a systematic approach in sequencing those services across partner agencies

The System



Supports Efforts Around



- Customized Employment
- Supported Employment
- Integrated Resource Teams

Customized Employment- Individuals



VRTAC-QM

- Customized employment (CE) refers to competitive integrated employment, for an individual with a significant disability, that is based on an individualized determination of the strengths, needs, and interests of the individual with a significant disability, is designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer, and is carried out through flexible strategies, such as:
- Job exploration by the individual
 - Discovery
 - Employment Planning

CE: Working with employers



Working with an employer to design and create employment, including:

- Developing a job description based on current employer needs or on previously unidentified and unmet employer needs. May include job creation through economic development strategies such as resource ownership or self-employment
- Developing a set of job duties, a work schedule, specifics of supervision (including performance evaluation and review), and determining a job location;
- Representation by a professional chosen by the individual, or self-representation of the individual, in working with an employer to facilitate placement; and

Brief History of CE Implementation



- CE training occurred in several states
- Training approach was often inconsistent in describing CE
- Agencies serving individuals with Developmental Disabilities were often the lead
- There was little technical assistance for planning and implementation of CE
- There was minimal formal evaluation of CE services
- There was minimal plans for sustainability
- CE wasn't clearly demonstrated as an evidence-based practice
- Result
 - CE was implemented with mixed results and often discontinued in several states, most of which VR was not involved

CE in the WINTAC grant



- Partners
- Certification
- Pilots
- Technical Assistance
- Evaluation
 - Fidelity
 - Evidence Based Practice
- Impacts
- Sustainability

National Training Partners



- Griffin-Hammis and Associates
- Marc Gold and Associates
- TransCen, Inc.
- Virginia Commonwealth University

National Certification



- WINTAC worked with the Association of Community Rehabilitation Educators (ACRE) to develop a national certification of Employment Services with an Emphasis on Customized Employment

CE Pilots



- Move from focus on IF a program/service works to...
-Finding the conditions necessary to make a program/service work
- Builds partnerships/clarify roles
- Builds infrastructure
 - Policies
 - MOUs
 - Fee Structures
 - Credentialing requirements
- Builds fidelity data and evidence based practices

Technical Assistance & Planning



- CE Overview/Orientation for VR agencies and partners (day-long session)
- Analysis of agency's readiness for and feasibility of implementing Customized Employment
- The development of a roadmap (project plan) for implementing Customized Employment
- Development of Pilot Project (s) for Customized Employment including identifying sites and providers
- Technical Assistance in developing an requests for proposal for CE Training
- Technical Assistance in developing agency policy, fee structures and MOUs with partner agencies

Evaluation



- WINTAC worked with states in conducting comprehensive evaluations of all CE project sites that includes:
 - Evaluation of provider capacity
 - Evaluation of quality of CE services
 - Evaluation of CE outcomes
- WINTAC developed an evaluation tool based on the Essential Elements for funders to help ensure the delivery of high quality of CE services

Fidelity



- Fidelity of Implementation is the commitment to following all policies and procedures when delivering an intervention. **
- The central question - was the program delivered exactly as written and prescribed.**
- Griffin-Hammis and Associates and Utah State University are field testing a Fidelity Scale for the Discovery Process
- The University of South Florida is also developing a fidelity tool

***Source: IRINSTITUTES.org*

Outcomes



- Increase in the number of individuals, including individuals with the most significant disabilities, receiving customized employment as a service Increase in the number of individuals placed in customized jobs
- Increase in the number of clients, including individuals with the most significant disabilities, with CIE goals
- Increase in statewide capacity and infrastructure to provide CE (systems change)

Emerging Impacts



- VR is partnering with other agencies and braiding funding at unprecedented levels
- In all WINTAC CE projects, VR is the lead agency of cross partnership planning and implementation
- Within states, General and Blind VR agencies are partnering to develop CE programs
- VR agencies report that staff acknowledge that CE changes their fundamental view of employability
- State agencies are aligning policies and procedures including MOUs
- Training providers are adapting their training practices to emphasize sustainability

Keys to Sustainability



- Stable partnerships (DD/MH/Medicaid/Education)
- Sufficient provider capacity
- Acceptable fee-structures
- Cost-effective on-demand training
- Credentialing policies
- ACRE Certification
- Fidelity evaluation
 - Griffin-Hammis and Associates
 - University of South Florida
- Quality assurance tools

Moving From Pilot to Sustainability



- Roadmap-Outlines key infrastructural element that need to be in place to implement a service delivery program
- Essential Elements-form the basis for:
 - Training
 - Evaluation/Quality Assurance
 - Credentialing
- Sustainability Plan- the Roadmap is the for:
 - Assessment of current state of implement
 - Sets objectives/targets for expansion
 - Creates and action plan to achieve objectives

Challenges for Sustainability (CE & SE)



- Turnover at both the agency and provider levels
- Sequencing services with DD and other agencies
- Developing fee structures that promote sustainability and incentive providers
- Serving rural areas or areas with limited provider options
- Determining provider capacity for delivering CE services

Tools to Support CE Sustainability⁽¹⁾



The following tools are designed to enhance the development, implementation and sustainability of Customized Employment (CE). All of these tools are available under **WINTAC's "Customized Employment Resource's" website.**

The following slides provide a summary of each tool available on that website.

Tools to Support CE Sustainability ⁽²⁾



- **Customized Employment (CE) Roadmap:**

This document outlines a suggested protocol to be used when developing, implementing and sustaining CE services

- **Essential Elements of Customized Employment for Universal Application:**

This is a document that outlines elements that subject matter experts determined are essential to the practice of Customized Employment (CE). Funders such as VR agencies can use this information to inform Requests for Proposals for training in CE, the development of contracts with providers of CE services and evaluating the effectiveness of CE practices

Tools to Support CE Sustainability ⁽³⁾



- **Customized Employment (CE) Delivery Checklist:**

This is the companion document to the Essential Elements of CE document above. It provides a checklist based on the that document to help ensure quality control for VR staff paying for CE services

- **Recommendations for CE Practices:**

This document outlines practices that subject matter experts recommend for effectively practicing CE. This document focuses on practices related to Customized Job Development. This document can also inform training on and evaluation of CE

- **CE Guidance on Making Referrals:**

This provides guidance to assist VR agencies to make good CE referrals

Tools to Support CE Sustainability ⁽⁴⁾



- **Customized Employment (CE) Webinar Orientation:**

This 50 minute webinar provides an overview of CE based on “The Essential Elements of Customized Employment for Universal Application” listed above. It provides an introduction to the CE process and summarizes the differences and similarities between CE and SE. It is not intended to be used as CE training which requires considerably more time and much more comprehensive coverage of CE material

- **CE Guidance on Mentoring:**

This provides guidance to states regarding critical aspects of the Customized Employment (CE) mentoring process necessary to learn and implement CE services

- **Customized Employment (CE) Sustainability Video Presentations:**

Colorado and Michigan VR agencies, along with partners, provide an overview on their CE pilots and sustainability plans developed to ensure CE services continue to be available and expand in each state. These videos provide excellent first-hand insights from each state agency regarding their CE models. Each video is approximately 25 minutes in length. Both were filmed in September of 2020.

Supported Employment (SE) Overview⁽¹⁾



SE is defined as “Competitive integrated employment (CIE), including customized employment; or employment in an integrated work setting in which an individual with a most significant disability is working on a short-term basis toward competitive integrated employment; and that is individualized and customized, consistent with the individual’s unique strengths, abilities, interests, and informed choice, including with ongoing support services for individuals with the most significant disabilities (Section 7(38) of

the Act and 34 CFR §361.5 (c) (53) and 363.1(b).

- NOTE: SE is a labor driven, post-employment, service(s) while CE delivers pre-employment services, such as Discovery, that are designed to customize the job for the individual to fully utilize their unique strengths to successfully achieve and sustain CIE

Supported Employment (SE) Overview ⁽²⁾



Majority of TA efforts focused on understanding and implementing major changes to SE under WIOA* including:

- All outcomes must be in an integrated setting with the additional expectation that individuals with most significant disabilities can and will achieve competitive wages
- Employment in a non-integrated work setting does not meet the requirement for an SE employment outcome
- Employment in sheltered workshops and enclaves and group employment settings does not constitute supported employment

(* WIOA changes in accordance with the requirements in section 604(b) (2) of the Act and 34 CFR §363.4(a) (2), in 34 CFR §361.5(c) (58))

Supported Employment (SE) Overview₍₃₎



Major changes to WIOA related to SE continued:

- Extending the time frame for the provision of SE services from 18 months to 24 months
- Requiring that SE be in competitive integrated employment (CIE) or, if not in competitive employment, in an integrated work setting in which the individual is working toward competitive integrated employment on a short-term basis.
- Requiring the availability of supported employment funds and/or VR program funds for providing extended services to youth with the most significant disabilities

Supported Employment (SE) Overview⁽⁴⁾



Major changes to WIOA related to SE continued:

- Requiring a reservation and disbursement of 50 percent of a State's allotment under the Supported Employment program for the provision of supported employment services, including extended services, to youth with the most significant disabilities
- Requiring a State to provide not less than 10 percent nonfederal contribution for the 50 percent of the allotment reserved to serve youth with the most significant disabilities
- Reducing the amount of funds that may be spent on administrative costs to 2.5 percent of the State's Supported Employment program allotment.

Supported Employment (SE) Overview₍₅₎



Major changes to WIOA related to SE continued:

- States are authorized to use SE grant funds to provide SE services and to provide extended services to youth with the most significant disabilities for a period of time not to exceed four years, or until such time that a youth reaches the age of 25 whichever occurs first, thereby no longer meeting the definition of a “youth with a disability”
- The new definition of Competitive Integrated Employment especially as it relates to achieving successfully SE employment outcomes

Ongoing SE delivery & Sustainability



In addition to assisting in implementing above changes, there were also long-standing challenges with SE that require a lot of TA including:

- Training approach was often inconsistent in describing SE
- Inconsistent definition of how high quality SE services are universally defined
- Provider capacity issues such as turnover, lack of training and consistent guidance
- Inconsistency in SE quality standards to measure quality SE delivery of services
- SE often inconsistently implemented with mixed results
- Often disconnected with key agency partners such as Medicaid in terms of effective braiding and sequencing of SE services
- Lack of viable long range plans to support high quality SE services like braiding of Medicaid resources

Supported Employment (SE) & Technical Assistance



- Provide SE Overview/Orientation for VR agencies highlighting WIOA changes
- Analysis of existing SE policies & procedures to align with WIOA
- Discussions with agency's regarding their current status in delivering SE
- Identify key areas of challenges associated with delivering and sustaining high quality SE services
- Developing and implementing a SE CoP that facilitated state agency exchanges, Q/A and overall capacity to deliver SE
- Develop tools for VR agencies to assist in identifying high quality SE service delivery and sustainability

SE National Training Partners



- Youth Technical Assistance Center (Y-TAC/Cornell University)
- Virginia Commonwealth University (VCU)
- Marc Gold & Associates (MGA)
- Griffin-Hammis Associates (GHA)
- University of Washington, Center for Continuing Education (CCER)
- Association of Community Rehabilitation Educators (ACRE)
- National Disability Institute
- ODEP's LEAD Center
- Association of People Supporting Employment First (APSE)

Supported Employment (SE) Systems Level Focus

- Similar to CE, the effective delivery and sustainability of high quality SE services requires a deliberate system's approach to universally define high quality SE services and build in an effective collaboration and braiding approach of various partner resources to sustain those services.
- The following tools are designed to enhance the development, implementation and sustainability of SE All of these tools are all available under **WINTAC's "Supported Employment Resource's" website.**

Tools to Support SE Sustainability (2)



- **Supported Employment Quality Features**

WINTAC, along with a wide variety of stakeholders with extensive SE experience developed the attached “Supported Employment Quality Features” document to identify and describe high quality features of supported employment as a guide for the universal application of these features across service delivery and training providers.

- **Supported Employment Core Features Checklist**

This document is intended to provide a checklist based on the above “Supported Employment Quality Features” to assist VR agencies in evaluating SE services that are being provided by VR staff and/or contracted service providers. Audience: service providers and VR staff that oversee SE services.

Tools to Support SE Sustainability ⁽³⁾



- **Essential Questions for SE Design**

This document is intended to help VR agencies set up the framework for and effectively support quality supported employment (SE) services. It's a companion document to the two referenced above. Audience: VR SE program managers-leadership.

- **SE Critical Policy and Definition Elements**

Compiled from multiple resources such as WIOA Law, regulations, and RSA guidance to provide a comprehensive view of Supported Employment.

Supporting a SE System's Approach



An effective SE System's approach to sustain high quality SE services includes

- Cross-agency partnering and braiding of resources supported by leadership and aligned with functional MOU's/MOA's describing sequencing of services
- Leveraging collaborative service delivery initiatives such as Employment First initiatives
- Following high quality, accountable, SE service delivery models in alignment with the High Quality Features of SE described above
- Effective partnering with providers to support long-term sustainable delivery
- Practicing systemic person centered service approaches such as Integrated Resource Teams (IRTs) described in the next slides

Integrated Resource Team (IRT) – What is it? ⁽¹⁾



- An IRT is initiated on behalf of an individual consumer who is experiencing multiple challenges to employment in order to address that individual's specific needs
- The IRT brings together a team of diverse service providers virtually, including community and partner agencies and other core partners, who work together with the individual consumer to strategize on how services can be coordinated to reach and maintain an employment goal
- The consumer and the team of service providers come together to establish three main components:
 - Consumer-identified, mutually agreed upon, employment goal
 - Lines of Communication
 - Sequence of Services

Integrated Resource Team (IRT) – What is it?⁽²⁾



- The Integrated Resource Team is an informal agreement between a consumer and the systems providing services to that consumer, allowing the members to coordinate services at the individual consumer level around a shared employment goal in either a traditional face to face or a virtual environment.
- This team approach promotes greater systems collaboration and increases cross-agency education and accountability of all parties involved in the IRT, including the consumer.
- Additionally, all IRT members may collectively gain credit for the consumer's employment outcome.

Who Participates in an IRT



- Workforce Partners (Titles 1, 2, and 3 WIOA)
- Mental Health
- Independent Living Center
- Programs for Deaf and Hard of Hearing
- Commission for the Blind
- Vocational Rehabilitation
- TANF
- Supported Employment Specialists
- Housing Providers
- Community Work Incentives Coordinators
- Developmental Disability Providers
- Veterans administration
- Natural Supports/Volunteers

Implementation of IRT Model



- **Phase 1: Active Resource Coordination**

- What are consumer's needs?
- Who is consumer currently working with?
- What services might consumer be eligible for?

- **Phase 2: Initial IRT Meeting**

- Employment Goal
- Communication
- Sequence of Services
- Multi-Partner Agreement

- **Phase 3:**

- Itinerant Meetings (as needed) typically linked to milestone completion
- Emergent Meetings (challenges arise)

Goals - Integrated Resource Team ⁽¹⁾



- Enhance cross-agency, cross-system collaboration and communication to better **leverage available resources** in a seamless way for an individual consumer in a traditional or virtual service delivery environment
- Help Vocational Rehabilitation/Commission for the Blind agencies and partner agencies **see the benefit of collaboration**, which, in turn, makes everyone's job easier
- **Promotes informal collaboration and relationship building** by bringing together public and private sector representatives from the community in real life or virtually to work together to assist an individual in meeting their employment goal
- Allows the members to **coordinate resources**, both financial and non-financial, at a consumer level around a shared employment goal

Goals - Integrated Resource Team ⁽²⁾



- The IRT, at its core, is **consumer driven**. The consumer participates in the IRT as an integral member of the team. Members of the team are based on the consumer's unique needs; therefore, it aligns with and promotes core Vocational Rehabilitation values of Self-Determination and Informed Choice
- The IRT, through its collaborative and coordinated approach to service delivery with its shared customers, shared resources and shared outcomes, creates a mechanism for **shared accountability**, even in a virtual environment
- Additionally, by sharing consumers, agencies can share resources and ultimately are **able to address the needs of more consumers**

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Citations (IRT)



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