

**Knowledge Development and Translation Initiative for Expanding Availability
and Use of Customized Employment**

Final Report

September 15, 2009

**Contract No. GS-10F-0042M
BPA Order No. DOLQ08942777
Task Order No. DOLU089428184**

PREPARED FOR:

**U.S. Department of Labor
Office of Disability Employment Policy (ODEP)
200 Constitution Avenue, N.W.
Washington, DC 20210**

PREPARED BY:



**3141 Fairview Park Drive, Suite 700
Falls Church, VA 22042**



**9300 Lee Highway
Fairfax, VA 22031**

1.0 INTRODUCTION AND BACKGROUND	1
1.1 Customized Employment	1
1.2 History of ODEP Customized Employment Initiatives.....	2
2.0 TASK 1: DEVELOPMENT OF A PROJECT WORK PLAN	4
3.0 TASK 2: IDENTIFICATION OF KNOWLEDGE, SKILLS, ABILITIES, AND OTHER CHARACTERISTICS.....	5
3.1 Methodology	5
Subject Matter Experts	5
Gathering and Reviewing Information	6
Job Analysis.....	7
Competency Development	10
Validation of the Competency Model	11
3.2 KSAO Task Results.....	12
Finalizing the Competency Model	12
3.3 Recommendations and Next Steps.....	13
4.0 TASK 3: TECHNICAL ASSISTANCE AND TRAINING	16
4.1 DDS Customized Employment Initiative	16
Approach.....	16
Participants.....	18
Evaluation.....	18
Progress Towards Employment Placement	19
Lessons Learned	19
Recommendations and Next Steps	20
4.2 APSE Conference Educational Sessions	21
Characteristics of the Participants	21
Overall Session Ratings and Comments.....	22
Recommendations and Next Steps	23
4.3 Multi-Media Educational and Outreach Tools	24
General Approach.....	24
Video Series.....	24
Print Brochures	26
Recommendations and Next Steps	27
5.0 TASK 4: PROVIDE QUICK TURNAROUND ON RESEARCH AND POLICY ANALYSIS	29
6.0 TASK 5: PROGRESS REPORTS AND COMMUNICATION	30
7.0 CONCLUSIONS	31

1.0 INTRODUCTION AND BACKGROUND

In October 2008, the Department of Labor's Office of Disability Employment Policy (ODEP) awarded a Blanket Purchase Agreement (BPA) to Economic Systems (EconSys) and its team of subcontractors to provide research and evaluation studies, training and technical assistance, and program support services. Included among the first task orders issued by ODEP under this BPA was a knowledge development and translation initiative to expand the availability and use of customized employment among employers, job seekers with disabilities, and employment specialists. This Final Report summarizes the key activities provided by EconSys and its subcontractor, ICF International (ICF) under this task order.

1.1 Customized Employment

Customized employment is a universal employment strategy that matches the workplace needs of the employer with the specific skills, interests, and needs of the job seeker to create a newly customized position to fill the unmet workplace needs. ODEP's website defines customized employment as "a flexible process designed to personalize the employment relationship between a job candidate and an employer in a way that meets the needs of both."¹ It is based on an individualized determination of the strengths, requirements, and interests of a person and an assessment of the organizational and operational needs of a particular employer.

As generally applied, but acknowledging variations among experts and customized employment research, customized employment consists of the following four components or phases:²

Discovery – focused on understanding the interests, skills, and preferences of the person seeking employment.

Job Search Planning – focused on developing a plan to meld the skills and aspirations of the person with disabilities with specific employment-related duties and responsibilities.

Job Development and Negotiation – focused on customizing a position of gainful employment with an employer and with the person with disabilities.

Post-Employment Support – focused on providing the supports necessary to assist the person maintaining employment.

Each of these phases is described briefly below.

Discovery includes the process of gathering information from the job seeker and the customized support team (a group of multiple partners, including the employment specialist, that jointly takes some responsibility for identifying the job seeker's needs, with the job seeker as the ultimate decision-maker) to determine the job seeker's interests, skills, and preferences related to potential employment that guide the development of a customized job. This process also is referred to as Individualization or Exploration.

¹ ODEP (2009). *What is Customized Employment?*

<http://www.dol.gov/odep/categories/workforce/CustomizedEmployment/what/index.htm>.

² Subsequent sections in this chapter describe the composition of the experts convened for this project.

Job Search Planning includes using the information learned about an individual job seeker during the Discovery phase to develop a plan toward meaningful employment, determine a list of potential employers, and conduct an analysis of the effects of work on the benefits for which the individual is currently eligible. Job Search Planning may also include Representation, which involves adequately representing the job seeker to potential employers at the job seeker's request. A representative should identify the job seeker's preferences for disclosure of his or her disability to the employer before negotiation begins. During Job Search Planning a portfolio or résumé also may be developed for the job seeker. The portfolios or résumés that are developed in this phase may include pictorial or video-based elements.

The third component, **Job Development and Negotiation**, consists of working collaboratively with the job seeker and the employer to negotiate a customized job. This negotiation may include the provision of supports as specified by the terms of employment. The ultimate goal of job development and negotiation is to create a match between the job seeker's interests, skills, conditions for success, and specific contributions and the unmet needs of an employer. A customized employment proposal can create a position using various methods, including job creation, job carving, job restructuring, entrepreneurship, and resource ownership.

Post-Employment Support, the final component, includes setting up on-going post-employment supports and monitoring the employment relationship to ensure satisfaction of the individual and the employer. This component also requires that the employment specialist work with the employer and the individual to resolve any issues that may arise.

Variation may occur in the number of components that may be completed, the steps within each component, and the number of individuals involved in the process. In some settings, customized employment services are provided by an individual employment specialist. In other cases, a team may provide the services. The component activities of customized employment may also be split among team members. For example, one person or team may be responsible for the Discovery and Job Search Planning components and another person or team responsible for the Job Development and Negotiation and Post-Employment Support components.

1.2 History of ODEP Customized Employment Initiatives

In 2001, ODEP began a five-year customized employment initiative that provided funding for 20 demonstration projects. The evaluation of these projects concluded that there were several important outcomes of the customized employment programs.³ First, customized employment can result in individuals with disabilities obtaining and retaining employment. Second, these services can be implemented in One-Stop Career Centers. And third, customized employment programs can change the attitudes of agency providers toward understanding the contributions that individuals with disabilities can make, and can change the attitudes of individuals with disabilities and their families in understanding that their employment goals can be met. Based on these findings and demonstration projects, ODEP sought to significantly expand knowledge about customized employment and the utilization of customized employment among public

³ Palan, M.A., Elinson, L., & Frey, W.D. (2007). *Evaluation of Disability Employment Policy demonstration programs. Task 10: A synthesis of key findings, issues, and lessons learned – Customized Employment Program priority area*. Rockville, Maryland: WESTAT.

and private organizations and employers. To this end, ODEP conceptualized the project summarized in this report.

The project included five tasks:

Task 1: Development of a project work plan

Task 2: Identification of knowledge, skills, and abilities and other characteristics

Task 3: Technical assistance and training

Task 4: Quick turnaround on research and policy analysis

Task 5: Progress reports and communication

In the next five chapters of this report, we describe the activities completed for each of these tasks, the findings and outcomes of each and recommendations for next steps. Because EconSys/ICF has separately provided task final reports for Task 2 and the individual sub-tasks in Task 3, this report does not include the extensive sets of appendices (including data collection instruments, training participant lists, etc.) provided in those reports which are incorporated by reference in this report.

2.0 TASK 1: DEVELOPMENT OF A PROJECT WORK PLAN

Under Task 1, the EconSys/ICF Team worked closely with ODEP to develop a project work plan to guide the conduct of all tasks and activities under the project to ensure that ODEP's goals and expectations would be met. The EconSys/ICF Team developed a detailed work plan based on the requirements in the Statement of Work and consultations with ODEP. The work plan included a description of tasks, activities, and deliverables; specific timeframes and due dates; and a list of key personnel.

To develop the work plan, the team participated in meetings and teleconferences with ODEP. As part of the task refinement, EconSys/ICF identified different options for proceeding under Task 3, with the final selection by ODEP being included in the final and accepted work plan.

3.0 TASK 2: IDENTIFICATION OF KNOWLEDGE, SKILLS, ABILITIES, AND OTHER CHARACTERISTICS

The purpose of Task 2 was to identify the full range of knowledge, skills, abilities, and other characteristics (KSAOs) needed by employment specialists to successfully implement customized employment with job seekers with disabilities. KSAOs are important for employment specialists and employment service organizations to understand the optimal staff characteristics and skills for implementing customized employment. This understanding can translate to better recruitment, training, and retention.

Key activities under this task included identification of the KSAOs for employment specialists, development of a competency model, and development of a presentation on the KSAOs for the Association for Persons in Supported Employment (ASPE) Conference (see Task 3).

3.1 Methodology

Our methodology for identifying the necessary KSAOs of individuals who are engaged in customized employment included the participation of subject matter experts (SMEs) and the following subtasks:

- Gathering and reviewing information
- Job analysis
- Validating the competency model.

Subject Matter Experts

A critical component of job analysis and KSAO development is the involvement of SMEs; therefore, our methodology involved the identification and recruitment of SMEs to form a KSAO Resource Group to assist in the KSAO development process. ODEP provided the names of 15 experts with varying types of experiences and expertise in customized employment from training to customized employment demonstration projects to research.

EconSys/ICF contacted the experts to explain the project, gauge their interest and willingness to participate, and request referrals to other experts that should be included in the research. Any referrals were provided to ODEP for approval prior to contact. A total of 28 experts were identified, and of these 26 agreed to participate in the process. Table 3-1 displays the 26 experts who were included in the KSAO Resource Group. For each expert, we provide the expert's organizational affiliation (if any), geographic location, referral source, and the expert's years of experience with customized employment.

Table 3-1: KSAO Resource Group Participants

Expert Name	Affiliated Organization	Geographic Location	Referred By	Years of Customized Employment Experience ⁴
Leslynn Angel	United Cerebral Palsy of Detroit	Detroit, Michigan	Patricia Chatman	16
Kate Brady	State Office of Developmental Disabilities	Atlanta, Georgia	ODEP	7
Nancy Brooks-Lane	Cobb and Douglas Counties Community Services Boards	Smyrna, Georgia	Cary Griffin	10
Carolyn Brown	Indianapolis Private Industry Council, Inc.	Indianapolis, Indiana	Lynn Elinson ⁵	*
Michael Callahan	Marc Gold & Associates/ Employment for All	Gautier, Mississippi	ODEP	9
Philip Chase	Human Services Management Institute, University of Georgia	Athens, Georgia	Doug Crandell	6
Patricia Chatman	Goodwill Industries of Greater Detroit	Detroit, Michigan	ODEP	*
Ellen Condon	Rural Institute University of Montana	Missoula, Montana	Cary Griffin	11
Doug Crandell	Cobb and Douglas Counties Community Services Boards	Smyrna, Georgia	Cary Griffin	10
Sheila Fesko	Institute for Community Inclusion	Boston, Massachusetts	ODEP	7
Cary Griffin	Griffin-Hammis Associates, LLC	Florence, Montana	ODEP	8
David Hammis	Griffin-Hammis Associates, LLC	Middleton, Ohio	ODEP	11
John Helton	CobbWorks!	Marietta, Georgia	ODEP	*
Rich Luecking	TransCen	Rockville, Maryland	ODEP	9
Melinda Mast	Brain Injury Association of Kentucky	Louisville, Kentucky	ODEP	23
Lisa Mills	Department of Human Services	Madison, Wisconsin	Patricia Chatman	3
Sean O'Brien	Department of Vocational Rehabilitation Central Office	Juneau, Alaska	ODEP	6
Anne Rea	WayStation, Inc.	Frederick, Maryland	ODEP	5
Dennis Rogers	Boston Private Industry Council	Boston, Massachusetts	Lynn Elinson	15
Fredda Rosen	Job Path	New York City, New York	Michael Callahan	6
Steve Savage	Indianapolis Private Industry Council	Indianapolis, Indiana	ODEP	7
Norciva Shumpert	Marc Gold & Associates/ Employment for All	Gautier, Mississippi	ODEP	12
Corey Smith	Via of Lehigh Valley	Bethlehem, Pennsylvania	Cary Griffin	6
Lisa (Cuozzo) Stern	MontgomeryWorks One Stop Workforce Center	Wheaton, Maryland	ODEP	6
Margie Thomson	Department of Vocational Rehabilitation Central Office	Juneau, Alaska	Sean O'Brien	7
Richard Toscano	Institute on Human Development and Disability University of Georgia	Athens, Georgia	ODEP	7

Gathering and Reviewing Information

Concurrent with the development of the KSAO Resource Group, EconSys/ICF conducted a review of the literature for research and information on customized employment. This step included a comprehensive review of materials provided by ODEP, a search of the academic literature on customized employment, and participation in customized employment training.

⁴ Years of experience were not available for all consultants.

⁵ Lynn Elinson is a consultant for Westat, one of the evaluators of the ODEP-funded Customized Employment Demonstration Program.

Materials included:

National Center on Workforce and Disability/Adult (2007). Customized employment employers and workers: Creating a competitive edge.

National Center on Workforce and Disability/Adult (2005). Portfolio Series Part I: Customized employment: Practical solutions for employment success.

National Center on Workforce and Disability/Adult (2007). Portfolio Series Part II: Customized employment: Applying practical solutions for employment success.

National Center on Workforce and Disability/Adult Website. (2008). www.onestops.info.

Palan, M. A., Elinson, L., & Frey, W. D. (2007). *Evaluation of disability employment policy demonstration programs: Task 10: A synthesis of key findings, issues, and lessons learned – Customized employment program priority area final report*. Rockville, MD: Westat.

Office of Disability Employment Policy (2004). Customized employment Q and A.

Journal of Vocational Rehabilitation, Special Issue: Customized Employment (2008). Volume 28, Number 3.

In addition to the materials ODEP provided, we searched the academic literature for additional articles and information on customized employment. Research-based search engines (for example, EBSCO Host) were used, searching on key words such as customized employment, workforce needs, vocational rehabilitation, workers with disabilities and employers, to locate articles. EconSys/ICF found one additional source of academic articles, *Journal of Applied Rehabilitation Counseling*, which was a rich source of information about customized employment. We also searched the Department of Labor's Occupational Information Network (O*Net) to identify information about the tasks and KSAOs involved in job titles that might be involved in or similar to those involved in customized employment. A complete list of the ODEP and other academic materials used in this task is provided in the KSAO final report.⁶

EconSys/ICF staff also participated in customized employment training provided as part of the Community of Practice (CoP) in Task 3.⁷ The training addressed the tasks and activities conducted during the Discovery and Job Planning components of customized employment.

Once we gathered and reviewed all of the available information, we developed a draft list of tasks and KSAOs associated with conducting the CE process.

Job Analysis

After gathering and reviewing customized employment materials, we conducted a job analysis to better understand the tasks performed during customized employment and to identify the KSAOs needed to perform those tasks. Job analysis is a systematic process of gathering,

⁶ EconSys and ICF International (2009). *Identifying Knowledge, Skills, Abilities, and Other Characteristics: Final Task Report* (Contract No. GS-10F-0042M) Falls Church, VA.

⁷ As part of work plan development, the Community of Practice concept for Task 3 evolved into a focused initiative with the District of Columbia's Department on Disability Services.

studying, and structuring information about a job's duties and tasks, internal and external relationships, required equipment, responsibilities, personal qualifications necessary for performing the job, and the conditions under which work is performed. The results of a job analysis can be used to write a job description, establish selection criteria including required competencies, or the knowledge, skills, abilities, and other characteristics (KSAOs) that are necessary to be successful on the job, and develop performance appraisal instruments.

Our job analysis of customized employment was conducted between February and May 2009. It involved conducting interviews with SMEs and then conducting a series of iterative SME panel reviews in which the panel reviewed and revised the initial list of customized employment tasks and KSAOs.

Standards for Job Analysis

The analysis process used by EconSys/ICF job for this task was consistent with well-established professional guidance set forth in the Uniform Guidelines on Employee Selection Procedures,⁸ the Principles for the Validation of Personnel Selection Procedures,⁹ and the Standards for Educational and Psychological Testing.¹⁰ The guidance provides a framework for determining the proper use of tests and other selection methods that are used to make employment decisions. Additionally, these guidelines help individuals, professionals, and organizations comply with requirements of Federal law that prohibit employment practices which discriminate on the grounds of race, color, religion, sex, and national origin. While development of KSAOs is not the focus of these documents, they are important in that they provide the standards generally recognized by both professionals and the court system. And while they do not require users to conduct validation studies, users are encouraged to use valid selection procedures for each such purpose for which it will be used (that is, hiring, training, and performance appraisals.)

Challenges of Job Analysis for Customized Employment

Conducting a job analysis can be a challenge due to the complexity of the job and to the numerous responsibilities that many jobs require. Conducting a job analysis of customized employment is a particular challenge because customized employment is process-driven and may involve multiple people in a variety of job positions. Job analyses are frequently conducted for one specific job at one organization; therefore, EconSys/ICF had to conduct the job analysis for customized employment in a different manner that considered the job requirements of a variety of jobs at a number of organizations. The goal of this job analysis was to create a comprehensive list of the KSAOs that are critical to the successful implementation of customized employment. That meant conducting an analysis to determine all the KSAOs required to implement all tasks related to customized employment, regardless of the job title or the degree to which each job was central or significant in the successful implementation of the

⁸ Equal Employment Opportunity Commission, Civil Service Commission, Department of Labor, & Department of Justice. (1978). *Uniform guidelines on employee selection procedures*. *Federal Register*, 43(166), 38290-38315.

⁹ Society for Industrial and Organizational Psychology. (1987). *Principles for the validation and use of personnel selection procedures*. (3rd ed.). College Park, MD.

¹⁰ American Educational Research Association, American Psychological Association, & National Council on Measurement in Education. (1999). *Standards for educational and psychological testing*. Washington, DC: American Educational Research Association.

process. The analysis is more aptly termed a “process task analysis” rather than a job or job-task analysis. As such, the resulting critical KSAOs may be manifested in a range of jobs (rather than in a single job) in organizations that implement customized employment.

Job Analysis Interviews

We interviewed 11 experts between February and March, 2009. Table 3-2 provides the names of each of the experts we interviewed. Each interview lasted between one and two hours. We developed a protocol for the interviews covering the following areas:

About their organization

The organization’s experience with customized employment

How customized employment is implemented in their organization

The activities they perform during each component of customized employment

General questions about training, experience, funding, and challenges.

This protocol provided a basis for the interviews, but each interview followed an individual course of discussion based on the expert’s responses.

Table 3-2: KSAO Interview Participants

Expert Name	Geographic Location	Customized Employment Experience	Interview Date
Kate Brady	Atlanta, Georgia	7 Years	March 3, 2009
Nancy Brooks-Lane	Smyrna, Georgia	10 Years	March 5, 2009
Mike Callahan	Gautier, Mississippi	9 Years	February 23, 2009
Doug Crandell	Smyrna, Georgia	10 Years	March 5, 2009
Shelia Fesko	Boston, Massachusetts	7 Years	March 2, 2009
Cary Griffin	Florence, Montana	8 Years	February 25, 2009
Rich Luecking	Rockville, Maryland	9 Years	March 3, 2009
Lisa Mills	Madison, Wisconsin	3 Years	March 19, 2009
Sean O’Brien	Juneau, Alaska	6 Years	March 9, 2009
Anne Rea	Frederick, Maryland	5 Years	March 23, 2009
Margie Thomson	Juneau, Alaska	7 Years	March 13, 2009

Using the information gathered during the interviews, EconSys/ICF revised the list of the tasks involved in each component of customized employment and further identified for each of the tasks the KSAOs that would be needed to perform the task.

Expert Panel Reviews

Following the interviews, we began a series of expert panel reviews of the draft tasks and KSAOs. We divided 17 of the experts into four groups and then provided each group – one at a time - the draft task and KSAO lists. Each group provided written feedback on the lists; feedback was discussed in a conference call with as many of the experts in that group as possible. Based on the written feedback and follow-up discussion, changes were made to the task and KSAO lists. Then the revised lists were sent to the next group of experts. This process continued until all four groups of experts had reviewed the tasks and KSAOs. Each group had one week to review the lists and provide their written feedback. Table 3-3 shows the experts

that were assigned to each group and the order in which the groups received the tasks and KSAOs.

Table 3-3: Expert Review Groups

Expert Name	Geographic Location	Customized Employment Experience in Years ¹¹
Group 1 – Reviewed task and KSAO lists from March 18 to March 26		
Kate Brady	Atlanta, Georgia	7
Carolyn Brown	Indianapolis, Indiana	*
Sheila Fesko	Boston, Massachusetts	7
Fredda Rosen	New York City, New York	6
Corey Smith	Bethlehem, Pennsylvania	6
Group 2 – Reviewed task and KSAO lists from March 30 to April 7		
Nancy Brooks-Lane	Smyrna, Georgia	10
Patricia Chatman	Detroit, Michigan	*
Doug Crandell	Smyrna, Georgia	10
Dennis Rogers	Boston, Massachusetts	15
Group 3 – Reviewed task and KSAO lists from April 9 to April 17		
Cary Griffin	Florence, Montana	8
Sean O'Brien	Juneau, Alaska	6
Anne Rea	Frederick, Maryland	5
Margie Thomson	Juneau, Alaska	7
Group 4 – Reviewed task and KSAO lists from April 23 to May 4		
Michael Callahan	Gautier, Mississippi	9
Rich Luecking	Rockville, Maryland	9
Lisa Mills	Madison, Wisconsin	3
Lisa Stern	Wheaton, Maryland	6

At the end of the iterative panel reviews, there were 31 tasks and 84 KSAOs. The tasks were organized into the four components of Discovery, Job Search Planning, Job Development and Negotiation, and Post-Employment Support.

Competency Development

Following the SME interviews and iterative panel reviews, EconSys/ICF developed customized employment competencies. While KSAOs are the fine-grained capabilities that one needs to have in order to perform a job, competencies exist at a more general level of specificity and consist of a cluster of KSAOs. Specifically, a competency is the description of a functional capability to perform a work requirement that is composed of a combination of knowledge, skills, abilities, and other individual characteristics, which can be reliably measured and shown to differentiate performance.

The competencies were developed using a Q-sort methodology, a technique in which individuals sort items into categories based on similarity.¹² The objective of the Q-sort in this

¹¹ Years of experience were not available for all consultants.

¹² Rosenberg, S. & Kim, M. J. (1975). The method of sorting as a data-gathering procedure in multivariate research. *Multivariate Behavioral Research*, 10, 489-502.

situation was to group KSAOs that were similar in nature and content. The final result was a total of nine customized employment competencies:

- Positive and Open Approach to Life** – Having a positive and open view towards people, things, and circumstances.
- Customized Job Development** – Competence in leading the job seeker and others in the interpretation and translation of information towards the development of a customized job.
- Customized Employment Components and Process** – Experience in the customized employment process, techniques, activities, and strategies.
- Respecting and Relating to Others** – Competence in respectfully interacting and building relationships, recognizing others’ perspectives and contributions.
- Business and Employment Practices** – Awareness of standard business and employment practices and operating principles.
- Business Networking** – Competence in building and maintaining networks, and making contact with employers and others.
- Collecting, Interpreting, and Using Information** – Competence in collecting information about the job seeker and employers, interpreting the information to identify needs, and using the information to develop creative solutions.
- Communicating with Others** – Competence in communicating with others through a variety of methods.
- Planning and Organizing** – Competence in sequencing and prioritizing activities and maintaining records.

Validation of the Competency Model

Validation of the customized employment competency model used a survey format. The validation survey provided the means to obtain verification from experts that the tasks and KSAOs identified in the model are integral to the successful implementation of customized employment. The survey included introductory paragraphs describing the nature of the customized employment process, 31 tasks grouped into four customized employment components, and 84 KSAOs grouped into nine competencies.¹³

Experts rated the tasks and KSAOs from two different perspectives. The first perspective was that of the customized employment team; specifically, “How important is it for a task or KSAO to be performed by someone on the customized employment team (that is, family, friends, agency staff, vocational support)?” The second rating was from the perspective of the employment specialist; specifically, “How important is it for the task or KSAO to be performed by the employment specialist?”

¹³ A copy of the validation survey is included in the KSAO final task report previously cited.

The validation survey was sent to all 26 members of the KSAO Resource Group; nine of the members of the Group had been specifically kept out of the development phase of the competency model to provide fresh, unbiased ratings during this validation phase. To ensure the experts understood the verification exercise and had the same framework in mind when making the ratings, we conducted conference calls with groups of experts to verbally explain the instructions and rating scales and to answer questions about the exercise.

3.2 KSAO Task Results

Twenty of the 26 experts completed the exercise and of these seven were experts who had not participated in the model development.¹⁴ Two of the 20 experts who completed the validation exercise worked in the same organization and provided one set of ratings, thus, nineteen sets of ratings were obtained. Descriptive statistics including the mean, standard deviation, and minimum and maximum ratings were calculated for each of the task and KSAO importance ratings. Frequencies were also calculated for each of the importance ratings.

The results of the data indicated that most of the experts had interpreted the customized employment team ratings and the employment specialist ratings differently than intended. The results suggested that most of the experts viewed the customized employment team in a supportive role to the employment specialist and did not consider the employment specialist to be part of the team, as was intended. Thus, a decision was made to consider only the employment specialist ratings in finalizing the model.

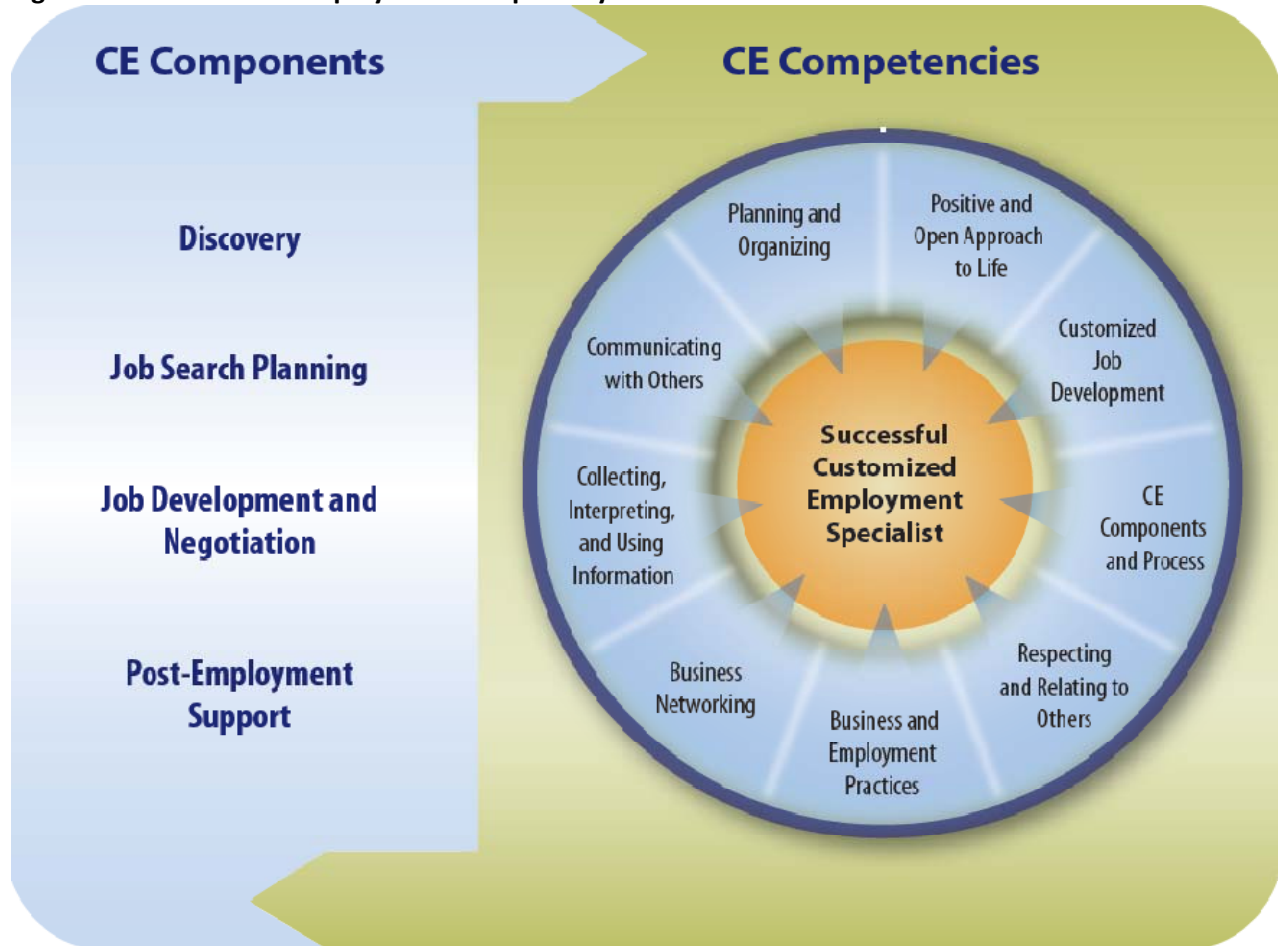
Finalizing the Competency Model

EconSys/ICF asked the experts in the KSAO Resource Group to provide comments on the model, including any tasks or KSAOs they believed were missing. Six experts provided comments about the model, and several changes were made as a result of those comments.

Once the competency model was finalized, we developed a diagram to depict the four customized employment components and nine competencies of customized employment specialists. This model was presented at the APSE 2009 Annual Conference and distributed as a handout (see Task 3). Following the conference, minor modifications were made to the model and handout to clarify terminology. The final customized employment competency model is shown in Figure 3-4.

¹⁴ An additional expert completed the exercise but sent the exercise in after we had completed the analyses so that expert's ratings were not included.

Figure 3-4: Customized Employment Competency Model



3.3 Recommendations and Next Steps

With the completed customized employment competency model, our recommendations in this section focus on promoting its use and acceptance across the industry, and utilizing the model for identifying staffing needs and developing evaluation criteria for identifying success at the organization level and the employment specialist level.

The customized employment competency model can be used in several ways to support ODEP's goals of increasing awareness and utilization of customized employment and of increasing the skills and capabilities of employment personnel for engaging in customized employment.

Recommendation 1: Publish and disseminate the model through a variety of media outlets.

The model can be used to increase awareness and understanding of customized employment and its requirements. In addition to outlining the KSAOs that are important to customized employment, the model outlines the components and tasks that are required to implement customized employment. Sharing these pieces of the model can help others learn about customized employment and what is involved in implementation.

Recommendation 2: Promote the customized employment competency model to distinguish customized employment from other employment strategies.

Comparing the customized employment competency model with a model of supported employment or traditional vocational rehabilitation can assist in creating a clearer picture of what customized employment is and how it is similar to yet different from other employment strategies. While differentiating customized employment from other strategies, the model also can provide a common framework for viewing customized employment within the field. If ODEP and agencies that implement customized employment adopt the customized employment competency model, they will have a shared framework for defining, thinking about, and using customized employment. Using this shared framework for customized employment, ODEP can work with providers to develop new funding possibilities to provide the financial resources necessary to retain the high quality employment specialists needed to implement customized employment.

Recommendation 3: Encourage service providers to use the customized employment competency model to determine their staffing needs.

Using the customized employment competency model in considering staffing needs can help agencies make sure that they hire, retain, and allocate qualified employment specialists to best meet the needs of job seekers. The competency model can help agencies determine the qualifications needed of employment specialists who are using customized employment (vs. those primarily using employer demand employment strategies). Whether an agency currently uses customized employment or is considering how to incorporate the approach into its processes, the model can be used to determine which KSAOs may be lacking or strongly presented among staff. Specialized training and technical assistance can then be provided.

Recommendation 4: Encourage service providers to use the model in their recruitment efforts.

The model can be used to assist in recruitment efforts. Agencies can focus job postings for customized employment specialists and other recruitment materials on targeted KSAOs. The model can also help provide a realistic job description for potential applicants. Because the model details the components, tasks, and KSAOs required to implement customized employment, potential applicants will get a well-rounded view of what the job entails, and they can make a better decision about whether to apply for the position.

Recommendation 5: Obtain further validation of the customized employment competency model so it can be used in the development of hiring and selection programs for Employment Specialists.¹⁵

Currently, the model provides a foundation for a hiring or selection program for employment specialists using customized employment, but in order for the model to be used fully in the

¹⁵ Equal Employment Opportunity Commission, Civil Service Commission, Department of Labor, & Department of Justice. (1978). *Uniform guidelines on employee selection procedures*. *Federal Register*, 43(166), 38290-38315; Society for Industrial and Organizational Psychology. (1987). *Principles for the validation and use of personnel selection procedures*. (3rd ed.). College Park, MD: Author; American Educational Research Association, American Psychological Association, & National Council on Measurement in Education. (1999). *Standards for educational and psychological testing*. Washington, DC: American Educational Research Association.

hiring and selection of employment specialists in a legally defensible manner, additional validation data would need to be collected. Once those data are obtained, the model can then be used to develop minimum qualifications and other selection tests that will identify the best candidates for the employment specialist job.

Recommendation 6: Use the model to guide customized employment training and certification efforts.

Once employment specialists are on the job, the model can be used to guide their training and potential certification. ODEP can sponsor the development of training programs and targeted technical assistance at the local/national levels for employment specialists with a focus on some or all of the customized employment components (building on lessons learned in Task 3 – the Customized Employment Initiative with the District of Columbia, for example).

Recommendation 7: Use the model to establish standards or standard practices for implementing customized employment.

Organizations that implement customized employment should work with ODEP to achieve agreement about standards of practice. This standardization does not need to result in inflexibility; however, if practices are standardized, ODEP will be better able to evaluate funding recipients and the effectiveness of customized employment, and providers will know the areas where they are doing well, and those that need improvement.

Recommendation 8: Develop metrics to measure performance in the competency areas.

To evaluate organizational-level performance as well as individual employees, metrics should be developed to measure performance in the competency areas. These metrics could be linked to human resources outcomes for individual employees such as training, promotion, or pay. At the national or program level, outcome metrics should be developed that could be used to monitor grantees, establish funding criteria, and evaluate the outcomes of customized employment (for example, placement rates, tenure of successful employment, employer acceptance of customized employment).

4.0 TASK 3: TECHNICAL ASSISTANCE AND TRAINING

The purpose of Task 3 was to provide education, outreach, and training activities to promote increased knowledge and use of customized employment. Task 3 included three major sub-tasks:

- Design and Implementation ODEP District of Columbia Department on Disability Services (DDS) Customized Employment Initiative

- Development of APSE Conference Educational Sessions

- Development of Multi-Media Educational and Outreach Tools.

This chapter summarizes each of these sub-tasks. Additional detail on each of these sub-tasks can be found in each sub-task's Final Task Order Reports.¹⁶

4.1 DDS Customized Employment Initiative

The goal of the ODEP District of Columbia Department on Disability Services (DDS) Customized Employment Initiative ("the Initiative") was to increase the knowledge and use of customized employment among a targeted group of individuals in the District of Columbia, including DDS staff, community service providers, stakeholders and other interested parties. ODEP and DDS sought to establish the District of Columbia as a national model for cross-agency collaboration and targeted knowledge transfer for the employment of persons with significant disabilities and other barriers to employment. This ambitious goal is the foundation of the still-ongoing partnership between ODEP and DDS, and the hope is to leverage lessons learned from the Initiative to replicate a training and technical assistance model for customized employment knowledge transfer in other settings.

With that said, the Initiative was specifically designed for DDS staff and partners, other Washington, DC-based public and private agencies, and community providers. Activities under the Initiative, including training and technical assistance, were developed and provided in close collaboration with ODEP. Judith Heumann, Director of DDS, and Rebecca Salon, consultant to DDS, identified participants, encouraged participation, and coordinated efforts between the various agencies.

Approach

From February 2009 to June 2009, EconSys/ICF worked with ODEP and DDS to develop and facilitate the Initiative that included a combination of live/in-person trainings and technical assistance webinars with experienced customized employment experts to transfer knowledge about customized employment to local employment specialists. Employment specialists

¹⁶ EconSys and ICF International (2009). *Task Report for ODEP DDS Customized Employment Initiative: Final Report* (Contract No. GS-10F-0042M). Falls Church, VA; EconSys and ICF International (2009). *Evaluation of APSE Conference Sessions: Final Report* (Contract No. GS-10F-0042M). Falls Church, VA; EconSys and ICF International (2009). *Task Report for ODEP Multi-media Educational and Outreach Tools: Final Report* (Contract No. GS-10F-0042M). Falls Church, VA.

engaged in this Initiative were asked to implement customized employment for job seekers that may need a different approach to employment from the traditional employer demand model. DDS identified employment specialists working at DDS as well as other District government and non-profit service provider agencies to participate in this Initiative. Participants learned about customized employment principles and strategies and, most importantly, how to apply them to obtain customized employment positions for individuals with significant disabilities.

An introductory conference call was held on February 11, 2009, to acquaint interested District stakeholders with customized employment and help them decide whether the approach was potentially an employment model they were interested in committing to learn more about. The Initiative then began with a 2-day training held February 26-27, 2009, to introduce the customized employment approach, its goals, the core concepts to be addressed, and to determine interest and commitment among attendees going forward.

Following the initial orientation session, a series of webinars and live training workshops were provided. All trainings were held in Washington, DC at DDS training facilities. In total, two 2-day trainings and one 1-day training were held, with an additional five webinars. The webinars consisted of audio teleconferences and the use of Live Meeting to share documents and materials virtually. Michael Callahan of Marc Gold and Associates/Employment for All and a nationally-recognized expert in customized employment was the dedicated trainer for the live trainings and most of the webinar sessions. In addition, EconSys/ICF facilitated an informal roundtable discussion in May with a small group of the participants to exchange ideas and share experiences as well as ask specific questions about implementing customized employment. On August 13, 2009, a webinar was held that included presentations from three customized employment experts including Melinda Mast of Marc Gold and Associates/Employment for All, Rich Luecking of TransCen, and Gary Shaheen of the Burton Blatt Institute at Syracuse University on customized employment outreach strategies and inclusive entrepreneurship.

Throughout the Initiative, participants were directed to other resources about customized employment, including publications from other experts in the field and materials available online such as a webinar hosted on the National Technical Assistance and Research (NTAR) Leadership Center website on the topic of "Customized Employment in an Economic Downturn: Leveraging Opportunities for Employers and Job Seekers" as well as resources published by Georgetown University's National Center for Cultural Competence. Participants were also encouraged to visit ODEP's website and explore the available information on customized employment. At the first training, ODEP distributed to all participants a package of materials with ODEP publications on customized employment. Mr. Callahan also provided participants with a wide array of resources that provided an impressive amount of information about customized employment. These resources included (1) PowerPoint presentations detailing each of the stages in the customized employment process accompanied with case study examples and (2) tools that participants can use and fill out as they work with their job seeker.

Participants

There were 31 District participants representing two government agencies and six nonprofit agencies that were actively involved in the Initiative at its conclusion. The District government and nonprofit agencies involved and number of attendees included:

District Government Agencies – 15

- Department of Mental Health (DMH)
- Department on Disability Services (DDS). Within DDS, there is the Rehabilitation Services Administration (RSA) and the Developmental Disabilities Administration (DDA).

Nonprofit Agencies – 16

- Deaf Reach
- Goodwill of Greater Washington
- Kennedy Institute of Catholic Charities
- National Children’s Center
- Psychiatric Center Chartered, Inc.
- St. John’s Community Services

Over the course of the Initiative, attendance varied but overall agency representation did not. Some participants involved in the beginning of the Initiative dropped out by the end, and some new participants joined the Initiative months after it began.

Evaluation

At each of the trainings, an evaluation form was distributed to participants.¹⁷ The evaluations gathered information from participants on the effectiveness of the presenters, the appropriateness and utility of training materials, the degree to which any feedback and “lessons learned” was used by the participants in implementation, and an overall assessment of how the trainings and technical assistance could be improved in the future. As the Initiative got underway, the evaluation forms also gauged how far along participants were in the customized employment process and how likely they were to implement and share customized employment strategies with colleagues in the future.

All participants that responded to the evaluations consistently indicated that their level of knowledge about customized employment increased as a direct result of the trainings, webinars, roundtable discussion, email updates, and materials distributed. On the final evaluation form, a majority indicated that they are confident that they will be able to implement customized employment strategies in their organization. And to the extent to which participants plan to share what they learned through the Initiative with other individuals in their organization, 8 of the 14 respondents to the final survey indicated that they plan to train

¹⁷ The evaluation summary as well as a copy of the evaluation form distributed at each of the three in-person trainings are included as Appendices to the ODEP DDS Initiative final report.

others within their organization and one said that she is hopeful after further technical assistance and training that she will be able to train others.

Progress Towards Employment Placement

One of the goals of the ODEP DDS Initiative was to have each participant identify a job seeker and implement customized employment strategies learned through the Initiative to develop a customized position. To assess progress in developing customized positions for job seekers, EconSys/ICF administered a survey following the final training in June. The survey asked each participant their status in the customized employment process as indicated by the stages described earlier in this report. Fourteen of the 31 participants completed the survey (45 percent). Of the 14 responses, four indicated they were not engaged directly with job seekers. Of the 10 other respondents, four are still in the job seeker selection stage; five are in the Discovery process; and one has begun to develop a profile for the job seeker.

Because none of the participants was very far along in the customized employment process, it is hard to make a clear assessment of how long customized employment will take for the Initiative participants. Much of this may depend on the individual client and the local labor market.

Lessons Learned

As reflected in the responses to the final survey, participants agreed that the presentation of the information through a combination of in-person trainings, webinars, and a roundtable discussion was an effective way to learn about customized employment. Most were not able to attend every in-person training and webinar but by sending participants the materials distributed during sessions via email, participants indicated that they did not fall behind and felt that they were able to stay up to date as the Initiative progressed.

In short, participants conveyed that the model used for the Initiative proved an effective way of introducing what to most was a new concept and set of tools to obtain employment for job seekers with significant disabilities. Among the specific comments provided by participants were:

- **Case studies** used throughout the trainings and webinars to illustrate particular concepts were an effective presentation style which helped participants readily understand how customized employment applied in the real world to real people.
- **Role-playing video** of a customized employment presentation to an employer used in one of the trainings allowed them to understand and visually see how the presentations to employers could be structured, including how to introduce the customized employment concept to an employer and how to introduce the job seeker.
- **Peer-to-peer exchange** and on-going discussions with peers through teleconference, in-person roundtable discussions, or small group technical assistance workshops are effective ways to exchange information and discuss potential best practices.

Participants also noted that a critical aspect to the success of the Initiative to date was the support of DDS. Nonprofit agency participants also indicated that a more formal endorsement

of the customized employment model from DDS leadership to nonprofit directors would be helpful to foster implementation.

Moving forward, participants indicated that one of the greatest challenges they expect in implementing customized employment is approaching and engaging employers. Employer outreach begins with careful and thorough research to understand companies and industries. Part of this may involve working with the District business community and providing it with some high level training on customized employment to emphasize how the approach can benefit their businesses and contribute to their bottom line. If an employer is already familiar with customized employment, the employment specialists are at an advantage and can better represent and negotiate on behalf of their job seeker.

Recommendations and Next Steps

The ODEP DDS Initiative has only just begun, and the District will benefit greatly from a continued partnership with ODEP to address on-going needs and eventually expand the scope of the Initiative to help address other populations with multiple barriers to employment such as TANF recipients, youth, and ex-offenders as well as extending to engage the employer community.

Recommendation 1: Continue to document the Initiative's efforts and best practices. ODEP and DDS should consider collecting data that could be used to conduct a longer term cost-benefit analysis of customized employment which would be helpful to replicating the ODEP DDS customized employment model in other communities across the country.

Recommendation 2: Expand the DDS Initiative model to other locations. Given the positive feedback on the Initiative's enhanced knowledge and (to some degree) behavior, ODEP should consider expanding the Initiative to other cities.

Recommendation 3: Continue and expand training on aspects of customized employment to the DC-DDS community. This expansion should include training on issues of concern and top interest, including population sub-sets such as youth and ex-offenders, to DDS and other agencies serving youth and adults with disabilities.

Recommendation 4: Continue training as Initiative participants make progress with customized employment to address emerging implementation issues and challenges. Use informational forums, training, technical assistance, webinars, and opportunities to interact with peers.

As this report is written, DDS has arranged to provide an additional series of trainings for the participating agencies of the Initiative as well as technical assistance for their on-going customized employment efforts. This additional support is funded through the District's Medicaid Infrastructure Grant (MIG).

4.2 APSE Conference Educational Sessions

EconSys/ICF developed or facilitated three conference training or education sessions that were presented at the annual APSE Conference held in Milwaukee, Wisconsin from June 29 through July 2, 2009. The three sessions were:

Increasing Staff Competencies to Maximize Customized Employment: Understanding the Necessary Knowledge, Skills, and Abilities for Direct Service Providers. The customized employment KSAOs developed in Task 2 were presented. The session took the form of a panel with Ronald Szoc, Ph.D. and Jennifer Harvey, Ph.D. from ICF International, Michael Callahan from Marc Gold and Associates, and Richard Luecking, Ed.D. from TransCen.

Utilizing Partnerships and Customized Approaches for Improving Employment Outcomes for Veterans and Transitioning Service Members with Barriers to Employment. This session focused on using customized employment strategies to improve the employment of veterans. It was presented by Lisa Stern from Montgomery Works.

Presentation of Research Findings on Self-Employment Policies and Practices within the Federal/State Vocational Rehabilitation System. This session presented findings related to self-employment within the context of an overall customized employment approach. The presenters were Grant Revell and Katherine Inge, Ph.D. from the Rehabilitation Research and Training Center at Virginia Commonwealth University.

To measure the effectiveness of the educational sessions in achieving knowledge transfer, at each APSE session, participants were asked by EconSys/ICF staff and/or the presenter(s) to complete an evaluation form after each session.¹⁸

Characteristics of the Participants

The attendance for the KSAO session was in excess of 75 persons; the attendance for the session on customized employment strategies for Veterans was approximately 20 persons; and the attendance for the session on research findings in self-employment (SE) was approximately 10 persons. Attendance fluctuated during the duration of each session.

Table 4-1 summarizes the characteristics of session participants who submitted completed evaluation forms for each of the three sessions. The last column contains the results combined across all three sessions.

¹⁸ A copy of the evaluation form is provided in the APSE Conference Sessions Final Report. The evaluation form for each session was identical except for the session title, date, and time which varied for each session.

Table 4-1: Characteristics of Participants Who Completed Evaluation Forms

Participant Characteristics	KSAO Session	Veterans Session	SE Research Session	Combined
(Number of Evaluation Forms Received)	11	14	7	32
1. What best characterizes your current position?				
(1) Direct service provider	9%	14%	14%	13%
(2) Management/administrator	64%	50%	43%	53%
(3) Researcher	0%	7%	0%	3%
(4) Policymaker/government official	18%	7%	0%	9%
(5) Employer	0%	0%	0%	0%
(6) Other (specify) _____	9%	21%	43%	22%
2. Which best describes the type of employer for whom you work:				
(1) Private sector – for profit	10%	14%	14%	13%
(2) Private sector – not for profit	60%	64%	71%	65%
(3) Public sector - Federal government	0%	0%	0%	0%
(4) Public sector - State or local government	20%	14%	14%	16%
(5) Self-employed	0%	7%	0%	3%
(6) Not employed	10%	0%	0%	3%
3. How would you rate your knowledge of this topic prior to the training?				
(1) I was not knowledgeable at all	9%	0%	0%	3%
(2) I was somewhat knowledgeable about this topic	46%	21%	29%	31%
(3) I was moderately knowledgeable about this topic	36%	50%	29%	41%
(4) I have advanced knowledge and experience in this area	9%	29%	43%	25%
(5) I am an acknowledged expert in this field	0%	0%	0%	0%

Most of the attendees at each of the three sessions were managers or administrators, with the vast majority employed in the private sector with not-for-profit organizations. The next most frequent type of organizations were State or local government bodies and for-profit organizations in the private sector.

Attendees differed in their self-reported level of knowledge of the topic presented, with those attending the KSAO session reporting a lesser level of knowledge for the topic than those in the other two sessions. This may reflect the new emergence of KSAOs in the field of customized employment, which has been in existence for less time than supported employment. Prior to the current ODEP Task Order under which the current KSAOs were created, no known competency models existed for customized employment service providers.

Overall Session Ratings and Comments

Session attendees were asked to rate each session on a number of factors relating to the information that was presented, the quality of the session materials and instructors, and the knowledge gained from the session. Means and standard deviations were computed for each individual rated item, as well as for items grouped into four categories:

Session Overall

Quality of Materials
 Quality of Instructors
 Increase in Knowledge and Skills.

The means and standard deviations for the item groupings are provided below in Table 4-2.¹⁹ All items were rated on a five-point Likert scale from “Strongly Agree” (coded as “5”) to “Strongly Disagree” (coded as “1”). A high rating can be interpreted as a positive impression on the part of the attendee and a low rating can be interpreted as a negative one.

Table 4-2: Ratings of Each Session and All Sessions Combined

Session Ratings	KSAO Session		Veterans Session		SE Research Session		Combined	
(Number of Evaluation Forms Received)	11		14		7		32	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Session Overall	4.57	0.56	4.36	0.64	4.32	0.75	4.44	0.65
Quality of Materials	4.74	0.56	4.42	0.50	4.50	0.53	4.55	0.54
Quality of Instructors	4.88	0.33	4.71	0.46	4.67	0.48	4.76	0.43
Increase In Knowledge and Skills	4.89	0.33	4.08	0.90	4.00	0.63	4.33	0.78

All of the sessions were rated very highly, usually receiving a rating of either “Strongly Agree” (5) or “Agree” (4). The low standard deviation supports the fact that there was not much variability among the ratings. Attendees offered only a few minor suggestions for ways the KSAO and research on self-employment sessions could be improved. Attendees had no suggestions for improvement for the Veterans session.

Some attendees also provided comments. The comments indicate a willingness and desire on the part of attendees to use the information obtained at the sessions (or to make it more usable), and to have more interactive sessions in the future.

Recommendations and Next Steps

The sessions held at the APSE conference were a success. Participants noted increases in knowledge. During information discussions with participants and other stakeholders, including key expert presenters, participants also raised questions about next steps, particularly in the context of conveying additional information on KSAOs to a broader audience and providing guidance on implementing and using this new competency model to hire, train and retain appropriate individuals for providing customized employment services to job seekers with disabilities. There are several key opportunities:

Recommendation 1: Create a dissemination and publication campaign on KSAOs to try and reach the largest possible relevant audience, using the handout distributed at the APSE session as one of the dissemination vehicles.

¹⁹ Means and standard deviations for each item can be found in the APSE Training Sessions final report.

Recommendation 2: Continue to fund training sessions and presentations at relevant professional meetings and conferences to keep disseminating the information on applications and implementations of customized employment.

Recommendation 3: Provide training in multiple, additional forums on KSAOs, including how to apply and implement (such as Department of Labor and private sector sponsored trainings, webinars, and interactive lectures).

4.3 Multi-Media Educational and Outreach Tools

The third sub-task focused on the development of a set of multi-media educational and outreach tools for broad dissemination as well as for use as part of training, technical assistance, CoPs, outreach to service providers and employers, and presentations by ODEP. Specifically under this sub-task, EconSys/ICF developed three videos and two print brochures:

- General video providing an overview of customized employment
- Video targeted to potential employers
- Video focused on youth in customized employment
- Customized employment educational/outreach brochure targeting employers
- Collection of success stories or vignettes of individuals in customized employment positions.

To develop these products, the EconSys/ICF Team worked closely with independent experts both to collect information and to participate in filming for the videos. The video development was directed by a subcontractor, Creative Strategies, under creative direction from ICF. These materials also included footage and content directly from individuals employed in customized positions, their families, and employment specialists.

General Approach

From February 2009 to August 2009, EconSys/ICF and Creative Strategies worked with ODEP to facilitate development of the videos and brochures. Customized employment experts were identified and consulted in the development of a list of individuals to feature in the videos and brochures. In developing the video series, Creative Strategies interviewed individuals in customized employment positions, their employers, co-workers and family members where appropriate, together with the experts who used customized employment for successful placement. In developing the brochures, EconSys/ICF conducted research and developed original copy, which was consistent with the material produced for the videos. Input was received from ODEP and select customized employment experts throughout the process.

Video Series

The video series was professionally developed using EconSys/ICF communication experts, supplemented by professional filmmakers and editors from Creative Strategies. The videos personalize customized employment by featuring employers and employees and their personal stories and showcasing innovative strategies and the benefits of customized employment through commentary from leading practitioners and researchers in the field. The content and scripts for each

of these videos were developed in consultation with a group of customized employment experts and practitioners and shared with ODEP staff prior to video production. The videos have open-captioning. The series consists of the following three individual videos:

Customized Employment: Creating Opportunities and Solutions (8 minutes)

This is a general overview of customized employment showing the approach as an innovative strategy for today's workplace. It shows customized employment as a process and an outcome that is about the person. It features success stories of people with disabilities, their families, employers, and customized employment experts.

Customized Employment: Solutions for Employers (4 minutes)

This video presents customized employment as an innovative strategy for employers to save money, make money, and increase efficiency. It spotlights models of success to show how customized employment is a solution for businesses and benefits the organization. The message comes through that the opportunity is really for the organization to better work in collaboration with their workforce; to find solutions that work for both the individual and the organization. It features a variety of employers and illustrates how through customization, their organizations benefited from hiring and retaining employees with disabilities.

Customized Employment: Solutions for Youth with Disabilities (5:30 minutes)

This video presents customized employment as an innovative strategy that creates a pathway to employment for youth with disabilities as they transition from school to work. It features a variety of employers and youth employees to illustrate how customized employment benefits younger job seekers.

A combination of customized employment experts, individuals with disabilities and their employers, co-workers and family members where appropriate, were interviewed across the country in the development of these videos. Below is the list of interviewees and locations. More detail on these individuals/employers is included in the Multi-Media Final Task Report.

Kansas

Joe Steffy, Poppin' Joe's

New York

Andrew Cosel, Stony Brook University Medical Center
Robert Barravechia, Stony Brook University Medical Center
Corey Smith, Customized Employment Expert

Washington, DC metro-area

David Hammis, Customized Employment Expert
Corey Smith, Customized Employment Expert
Lisa Stern, Customized Employment Expert
Ellen Condon, Customized Employment Expert
Rich Luecking, Customized Employment Expert
Marie Parker, Customized Employment Expert

Cathy Benko, Vice Chairman and Chief Talent Officer, Deloitte
Antoinette, Loehmann's
Van Newcomb, Montgomery County
Joan Plotkin, Montgomery County Dept. of Liquor Control
Jhason Abuan, Montgomery County Dept. of Liquor Control

Mississippi

Andrew Higginbotham, Mississippi Power Company
Jon Carter, Mississippi Power Company
Maria Hamilton, Andrew Higginbotham's mother
Amanda Sauls, Plan House Printing and Graphics
David Ainsworth, Plan House Printing and Graphics
Kathy Williams, Transition Specialist, Harrison County School District
Lucille Sauls, Amanda Saul's mother
Mike Callahan, Customized Employment Expert
Norciva Shumpert, Customized Employment Expert

Ultimately these videos can be used in presentations on customized employment within the Federal government and in the field, in webinars and streaming video posted to the ODEP website, and as part of training presentations.

Print Brochures

EconSys/ICF developed two brochures: one for employers and one showcasing success stories in customized employment. The short brochure for employers provides succinct information regarding customized employment to 1) increase awareness and understanding among employers about customized employment and 2) increase awareness of how customized employment can benefit employers in terms of filling unmet needs and efficiently allocating resources. The main message of the employer brochure is that customized employment is financially beneficial. The brochure explains the concept and benefits of customized employment. As a marketing piece, it also incorporates examples of how customized employment has been successful in meeting the workforce needs of employers and contributed to their business goals. Quotations from employers such as Deloitte Consulting, LLP, Stony Brook University Hospital, and Montgomery County Government are featured.

The second brochure includes a set of vignettes or "success stories" related to the use of customized employment among individuals with disabilities. The objectives for this brochure were to 1) increase awareness of the successes in using customized employment among persons with disabilities and benefits realized both to job seeker and to employer and 2) capture the range of customized positions and extent of customization as well as its benefits. The vignette format consists of short descriptive success stories describing the individuals profiled with their photos,²⁰ customized position, and benefits to employers. The brochure uses a positive, encouraging, professional, and

²⁰ For individuals featured in the videos and brochures, only their first name and the first initial of their last name will be provided in order to protect individual privacy.

polished tone, providing particular insight into proven strategies that have led to successful employment placement and careers for job seekers with disabilities. Information for the vignettes were gathered from the field through interviews, direct outreach, and as the video series was developed.

Recommendations and Next Steps

During the development of the initial series of videos, ODEP and EconSys/ICF (including Creative Strategies) identified additional disability employment topics that can be covered to expand the video series. Depending on the script and content, all or part of these additional customized employment videos can be based on existing film footage with some additional filming to focus the message. Potential topics that can build on existing footage are provided in Table 4-3, while potential topics that will need additional footage are provided in Table 4-4.

Table 4-3: Potential Video Topics Using Existing Footage

Video Topic	Video Specifications
1) Process video: Discovery, Planning, Negotiation, Support (what each of these involves)	<ul style="list-style-type: none"> ▪ Recommend creating as a <i>training video</i> (vs. outreach/education videos currently in process). ▪ Audience would be employment specialists ▪ 10-12 minutes ▪ Can incorporate into DDS Initiative type of training setting for future trainings or use with KSAO training if developed ▪ Some additional filming will be required
2) Funding Video: Braiding and blending of funds and services	<ul style="list-style-type: none"> ▪ Audience would be practitioners, employment specialists, and organizations serving job seekers with disabilities including Administrative staff in these organizations ▪ 5-7 minutes ▪ Some additional local filming would be required (e.g., at Montgomery Works) ▪ Consider also incorporating NTAR work on funding
3) Guideposts for Education and Youth	<ul style="list-style-type: none"> ▪ Field has noted great value in this video ▪ Audience would be parents of children transitioning from school to work, school administrators, employment specialists seeking to do more transition ▪ 5-6 minutes ▪ Some additional filming at a school would be required
4) Extensive profiles of Joe Steffy and Andrew Higginbotham and the benefits of self-employment	<ul style="list-style-type: none"> ▪ Option to focus on autism and employment opportunities (as distinct from self-employment, see below). ▪ 5-6 minute video ▪ Featuring Joe Steffy and Andrew Higginbotham ▪ Some additional filming might be needed

Table 4-4: Potential Video Topics Collecting Additional Footage

Video Topic	Video Specifications
1) Parents: Resources and how to use customized employment	<ul style="list-style-type: none"> ▪ Highly valuable to parents ▪ Audience would be parents of children with disabilities who are of age to work.

	<p>Could be coupled with transition video for those with children emerging from school environment but also would focus broadly on customized employment from parents perspective</p> <ul style="list-style-type: none"> ▪ 10 minutes (information resource video) ▪ Filming, including filming with focus on parents, would be needed ▪ Could talk about gatekeepers, barriers from parents' point of view
2) Veterans	<ul style="list-style-type: none"> ▪ Politically valuable ▪ Perhaps link with ongoing efforts with disabled veterans, Veteran's Administration, private organizations like Paralyzed Veterans of America, National Organization on Disability (NOD), National Council on Disability (NCD) ▪ 4-6 minutes ▪ Additional filming required to focus on veterans
3) Temporary Assistance for Needy Families (TANF)	<ul style="list-style-type: none"> ▪ Of interest both to DOL/ODEP and HHS, and some current CE programs already target TANF individuals ▪ Could be linked to asset development work ▪ 5-6 minutes
4) Self-Employment	<ul style="list-style-type: none"> ▪ Link with Virginia Commonwealth University efforts on self-employment and other ODEP-sponsored work on self-employment, could also incorporate CRPs ▪ 5-6 minutes
5) Funding: Use of Medicare and Medicaid	<ul style="list-style-type: none"> ▪ Funding-specific video that focuses on blending and braiding ▪ 5-6 minutes
6) Outreach to Employers	<ul style="list-style-type: none"> ▪ Focus on practical tips and guidelines for reaching out to employers, including step-by-step training or guidance through the process ▪ 10 minutes

5.0 TASK 4: PROVIDE QUICK TURNAROUND ON RESEARCH AND POLICY ANALYSIS

Task 4 was designed to allow EconSys/ICF to provide rapid response or *ad hoc* consulting support and services to ODEP based on quick-turnaround requests. Under this task, EconSys/ICF supported three meetings of the Federal Interagency Working Group on Asset Development and Financial Education (ADFE) for People with Disabilities. This Working Group, chaired by ODEP, includes representatives from multiple Federal agencies including other offices within the Department of Labor, the Social Security Administration, multiple offices within Health and Human Services, the Internal Revenue Service and other offices from the U.S. Treasury, and the Department of Education. The Working Group's mission is to focus on asset development and financial education specifically for people with disabilities and to develop recommendations to improve Federal policies and programs in these areas. EconSys/ICF attended and took notes for AFDE Working Group meetings on June 4 and September 10 and a smaller meeting of the AFDE senior management team on July 29. EconSys/ICF also hired a facilitator, Michael W. Morris, to facilitate the July 29 meeting and to develop a framework for future action, including shorter and longer-term goals for the Working Group.

6.0 TASK 5: PROGRESS REPORTS AND COMMUNICATION

The purpose of Task 5 was to provide ODEP with open and ongoing communications regarding the progress of the project and its individual tasks. A key component of Task 5 was monthly progress reports to ODEP. These reports were submitted by the 15th of each month by EconSys and provided detailed updates on:

- Summary of work completed each period (the month of submission).
- Summary of work planned for next period (the following month).
- List of problems or challenges encountered and/or expected as necessary.
- Proposed solutions for these challenges.
- Listing of outstanding items or issues.

In addition to the monthly reports, EconSys/ICF conducted periodic calls with ODEP. In these conference calls, ODEP and EconSys reviewed progress, coordinated activities, discussed challenges, solicited feedback on deliverables, and otherwise exchanged information pertinent to the effective implementation of the tasks in this project. EconSys/ICF also communicated via email with the designated project points of contact for brief periodic updates and to transmit drafts of deliverables.

This task also included the development of four Task Order Final Reports:

- Identifying Knowledge, Skills, Abilities, and Other Characteristics: Final Task Report
- Task Report for ODEP DDS Customized Employment Initiative: Final Report
- Evaluation of APSE Conference Sessions: Final Report
- Task Report for ODEP Multi-media Educational and Outreach Tools: Final Report

EconSys/ICF also developed the draft final project report and the final project report (this document) under this task.

7.0 CONCLUSIONS

Overall the activities conducted under the task order, notably the training and technical assistance tasks, were successful in increasing the knowledge of participants about customized employment. The lessons learned as part of these activities and through the development of supporting customized employment materials, notably the competency model, KSAOs, and a number of multi-media educational and outreach products, provide a strong foundation for continued growth and capacity and knowledge building among employers, employment specialists, policymakers, and job seekers. To this end the EconSys/ICF Team has provided a number of recommendations to further expand the use of customized employment in the field and increase the capabilities and capacities of public and private employment organizations.