



# Innovative Workforce Fund

## Final Implementation and Reflection Report

# Customised Employment

August, 2018

Smith, P., McVilly, K., Rhodes, P., Pavlidis, L., (2018). *Customised Employment: building workforce capacity for and establishing an evidence-based means of achieving the social and economic participation of people with disability*. Final Report to the Innovative Workforce Fund. Sydney: Innovative Workforce Fund (IWF).



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## 1. Project details

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<b>Organisation</b>	University of Melbourne Centre for Disability Employment Research & Practice (CDERP)
<b>Project ID No.</b>	86538836
<b>Project Name</b>	Customised Employment: building workforce capacity for and establishing an evidence-based means of achieving the social and economic participation of people with disability.
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## 2. Reporting on outcomes

### 2.0 Introduction

#### What this project achieved

This project developed an approach to Customised Employment (CE) tailored to the needs of Australians with disability. An overview of Customised Employment is provided at Section 4 of this report, and an overview of the final curriculum for the staff development program (The Work First™ curriculum) is provided in the appendices. Also, the appendices include links to several on-line resources generated as part of this project (e.g., interviews with world experts in CE, and managers implementing CE in their organisations), which could be used in both staff and organisational development activities.

To achieve its purpose, the project focused on formulating, piloting, and refining a staff development program designed to up-skill the disability workforce to deliver Customised Employment using a specific process - Discovering Personal Genius™ (DPG), referred to in this report as Discovery. The Work First™ curriculum was developed by Peter Smith in collaboration with Cary Griffin, the founding CEO of Griffin Hammis Associates (GHA) in the USA. GHA are recognised leaders in the field of Customised Employment, with over 30 years' experience developing and implementing Customised Employment.

The Work First™ curriculum was developed for an Australian context while maintaining fidelity to the curriculum developed in the US by The Association of People Supporting Employment First (APSE), and the Association of Community Rehabilitation Educators (ACRE). The ACRE competencies were first developed in 2004, and recently revised in 2017 to incorporate the 'Essential Elements of Customized Employment', developed jointly by the Workforce Innovation Technical Assistance Center (WINTAC) and the Vocational Rehabilitation Youth Technical Assistance Center (Y-TAC). These competencies are used to assess and formally accredit employment consultants in the USA (Certified Employment Support Professional), under the oversight of the Employment Support Professional Certification Council (ESPCC). A certification process for Australia is, at the time of preparing this report, being investigated.

The staff development program was trialled across Victoria and the ACT, involving four service providers. A total of 12 disability support staff participated in the training. However, at the time of compiling data for the current report, data were only available for 8 staff. Subsequently, the trainees undertaking the staff development program facilitated Discovery Plans for 29 people with disability, of whom 18 progressed to the job development phase. At the time of preparing the current report 5 people with disability were actively engaged in discussions with employers, and 2 had been offered employment.

The timelines to establish the project and implement the staff training meant that at the time of reporting, the disability support staff involved in the training were only at the early stages of developing their competencies. Here it was evident that staff

required at least 40 hours of training (supported with mentorship) to begin to reach a satisfactory level of competency.

Furthermore, there were time-limited opportunities for people with disability to fully realise their employment potential. However, it was clear that once 'on the journey', the job seekers with disabilities (and their families) were well positioned to pursue employment that was suited to, and meaningful for, the person with disability. The extent to which they would require ongoing support from an employment consultant is yet to be determined. A longitudinal study would be required to investigate this, and subsequently the sustainability of the employment outcomes.

The project worked with service providers to investigate and establish what was required to develop a sustainable organisational model to support the implementation of Customised Employment. Subsequently, this report documents the findings of interviews conducted with service providers as part of a research project undertaken in conjunction with the development and trial of the staff development program.

Also, several community forums were conducted in collaboration with the partner organisations. These included: two 3-hour public meetings and information sessions for families and the wider community held at both Melbourne and Canberra; and one 3-day workshop at Melbourne for families on implementing Self-guided Discovery in preparation for NDIS planning meetings.

Based on the findings of the current project, manuscripts to contribute to the peer-reviewed literature are in preparation, and briefing opportunities for families, service providers and government are being arranged. Discussion of the findings from the current project and their implications for the disability employment sector will feature during the annual CDERP Disability Employment Think Tank; 30<sup>th</sup> October to 1<sup>st</sup> November, at Warbuton, Victoria: <http://www.cderp.com.au/events.html>

#### How this project was implemented

This project was conducted as a consortium of agencies; including the University of Melbourne, the Centre for Disability Employment Research & Practice, and four service providers. The protocol for the research component of the project was reviewed and subsequently approved by the University of Melbourne Human Research Ethics Committee: HREC ID 1750291. Each of the agencies also reviewed the protocol according to their internal research or quality assurance processes.

Table 1 shows a GANTT Chart summarising the key activities of the project and the implementation timeline.

Table 1: GANTT Chart of the research project and implementation timeline

Milestones, Tasks, & Deliverables	Timeframes (Months)											
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July
<b>1. Establishment of Project</b>												
Governance / Reference Group	X			X			X			X		X
Ethics		X										X
<b>2. Program Development</b>												
Consolidation of current resources	X	X										
Development of educational resources	X	X										
Consultation with US Experts	X					X					X	
Consultation with service providers	X	X										
Consultation with people with disability	X	X										
Report on program development			R									
<b>3. Industry Capacity Building</b>												
Recruitment of employment coaches		X	X	X								
Training of employment coaches				X	X				X	X	X	
Evaluation of training program						X					X	
Report on training program							R					
<b>4. Implementation &amp; Evaluation of CE pilot program</b>												
Recruitment of participants			X	X	X							
Implementation of CE program					X	X	X	X	X	X		
Evaluation of CE program									X	X	X	
Report on CE program												R
<b>5. Dissemination of Findings</b>												
Briefing for government												>
Posting of findings to project website												>
Presentations at conferences												>
Publication of papers												>

## How the project was evaluated, and the evidence-base developed

Given the purpose and scale of the project (i.e., curriculum development and trial with a small number of staff), data were primarily qualitative in nature; based on interviews conducted with service providers, people with disability and their families. The methodology adopted for the analysis was Interpretative Phenomenological Analysis (IPA).

IPA differs from the traditional biomedical model of research in that it places importance on the participant's perceptions and interpretations of their experience of phenomena (Brocki & Wearden, 2006). This method allows for the use of semi-structured interviews, acknowledging the participant as expert and provides a collaborative approach between the participant and researcher in the collection of data (Smith, Flowers & Larkin, 2009). Data samples are typically between one to fifteen participants (Pietkiewicz & Smith, 2014).

Importantly, the epistemology of IPA is orientated towards an individual's understanding of their own lived experience. It is therefore well aligned with the philosophy and principles underpinning the contemporary provision of services for people with disability. The non-directive approach to interviewing worked well with the both client and service provider participants, allowing for a broad range of topics to be explored and placing primacy on the participants' experiences and the issues that they wished to raise.

The findings of this report are summarised below, according to the three main outcomes prescribed for the Innovative Workforce Fund (IWF):

- (1) Service user satisfaction and empowerment;
- (2) Worker skills and engagement; and
- (3) Organisational sustainability.

Participant quotations are used to illustrate the emerging themes.

### 2.1 Service user satisfaction and empowerment

At the time of preparing this report, data were available from six participants with disability and their families. Demographic data about the participants are included in Table 2. Family members were included in the interviews given both participants and their families were considered on the journey of Discovery together.

Table 2: Demographic information and high-level comments on the process

Gender	Age	Disability	Participant Comments on Discovery Plan Process
M	18-25	ID/DD	'Comprehensive, positive and motivating'; 'ready to try new things'.
M	18-25	ID/DD	'The home visits'; 'informative'; 'a respectful approach'
F	18-25	ID/DD	'The home visits'; 'positive experience'; 'positive relationship'.
F	18-25	ID/DD	'Learnt new things'; 'positive & inspiring experience',
M	18-25	ID/DD	'Enjoyed the process; 'competent staff, very understanding'; 'taking the time that was needed to figure it out'.
M	18-25	ID/DD	'A changed young man; 'deeper understanding'; 'positive attitude'.

ID: intellectual disability; DD: developmental disability.

Data from these participants gave rise to six dominant themes:

1. Client engagement and growth
2. Deeper levels of understanding
3. Discovering Personal Genius process
4. Staff
5. Continuation of program
6. Communications

#### Client engagement and growth

Notable among outcomes was the reporting that participants had 'developed', simply from participating in the DPG process. These skills ranged from understanding about money and work, skills for improved community interaction and, importantly, the ability to imagine and develop a career pathway.

"She's really enjoying meeting new people and learning new things and it's not so much learning new things but that she's doing them over and over again so it's sort of cementing those into her day as she learns"

This quote illustrates a well-documented outcome of the Discovery process; that informational interviews (a core process in Discovery) followed by work experiences, build skills that are valued and retained by participants - skills that enhance employability and overall client capacity. This aspect of employment practice is routinely ignored in mainstream disability employment practice, where the focus is generally solely on 'getting a job' (Smith, 2018).

#### Deeper levels of understanding

There was almost universal agreement across participants that the DPG process allowed for a deeper, richer level of client understanding. Importantly the DPG process had significant impact on parents who, despite their long-term relationships and proximity to their sons and daughters, learnt new things about them through the DPG process.

“They’re figuring it out, they’re taking the time to look at the individual, figure out what their skill base, but they’re also then figuring out what they really like and what would be the driver because that’s their motivation”.

“I’ve learnt that he is far more flexible and more capable and independent”.

“Wow, okay, ... he does like people and he does like to follow up and that sort of stimulates him as well”.

This highlights the benefits of DPG beyond simply an employment focus. Rather, it highlights the important potential DPG has for fostering insight and relationships among family members. These relationships are known to be influential when sustaining employment for the person with disability in the longer term.

### Discovering Personal Genius™ process

Consistent with the level of understanding being gained, the DPG process was further highlighted for its rich level of client engagement, as illustrated by the following quotes;

“Yeah, it’s comprehensive, but really good” and “I think it’s been really positive from our end”

“They came and met xxxxx and got to know xxxxx and xxxxx ... made the girls a cup of coffee and got a chance to show them some of her favourite things and they looked great and it’s about xxxxx and she loved it”

“It’s brilliant, what a great idea”

“They’re like, “Oh, you want to know what I like?”

These quotes further highlight the person-centered origins of the process and how when applied with fidelity to process, remain consistent with authentic individualised person-centred practice.

### Staff

Participants found that staff had a deeper level of engagement. This was reflected in their respectful motivated engagement with participants and family members. This is suggestive of an approach that is congruent with participant values and beliefs.

“Really positive and respectful”

“Okay fantastic, okay yeah. Certainly, their motivation and their dedication to it is definitely there and they’re very respectful but weekly they mingle with me to, so I feel like I’m very included in I guess where this is going”

### Continuation of Program

There was a consistent concern expressed by participant families that they needed the program to continue and spread out to other families and employers. This is part of the

process of managing client family expectations and potentially highlights that families see the program as a sign of real progress towards inclusive employment outcomes that focus on both the clients and employers. This is consistent with the idea of mutuality (Smith, 2018; Luecking, Fabian & Tilson, 2004) that highlights the importance of developing a relationship built on shared respect as part of the employment process. The following quotes illustrate that concern:

“It needs to continue because it’s far more tailored and a far better approach than the other stuff”

“I just wish more people would be a part of the program as in employers”

## Communications

It should come as no surprise that improved communication is another outcome of taking a more person-centred and family orientated approach to the employment question. This level of increased communication, consistent with the literature serves to build relationships of mutuality based on trust, one of the known factors in successful employment outcomes (Smith, 2018).

“they’re definitely communicating with us frequently”

“they seemed organised, I’m enjoying the weekly updates that we get through email”

It should be noted that placing a high value on regular and clear communication was a consistent issue across all participants in this project.

## Conclusion

There was evidence that people with disability (and their family / support networks) gained knowledge and understanding of the Discovery process, and how it could be used to facilitate employment outcomes. People with disability clearly exercised choice and control throughout the implementation of the Discovery program. People with disability and their families valued the process, and where they had previously been involved with employment support services, they saw this as something distinctly different and providing a more wholistic and person-centred approach.

However, the time lines required to establish the project and implement the staff training meant that there were time-limited opportunities for people with disability to fully realise their employment potential. However, it was clear that once ‘on the journey’, people and their families were well positioned to pursue employment that was suited to and meaningful for the person with disability.

For several participants, they completed their involvement in the project having gained the insights and supporting documentation needed to have economic participation included in a future revision of their NDIS plan. The extent to which they would require ongoing support from an employment consultant is yet to be determined. A longitudinal study would be required to investigate this, and the subsequent sustainability of their employment outcomes.

## 2.2 Worker skills and engagement

At the time of preparing this report, data were available from eight staff who had undertaken the training. Demographic data from staff is included in Table 3. This represented a cross section of the provider participants. A range of experiences were evident in the interview data.

Table 3: Demographic data from staff members

Gender	Age	Years of experience in disability sector	Previous experience in employment support (Y/N)
Female	20-30	2 years	Y
Female	30-40	2 years	Y
Female	30-40	12 years	Y
Female	30-40	2	Y
Female	20-30	1	N
Female	30 -40	15 years	Y
Female	40+	N/a	Y
Female	20-30	N/a	Y

Here it should be noted that, consistent with overseas experience, the adoption of the CE process will often challenge staff beliefs. CE is based on the philosophy that everyone can, with the right supports, pursue employment; a zero-exclusion proposition. For some people this is a challenging concept. This seemingly radical proposition can result in some staff changing their approach to their work, and others leaving an organisation. Overseas experience has illustrated that the process of embedding CE in an organisation can be as much about 'moving on' the wrong staff as it is about enriching the practice of the right staff. This was evident among some organisations involved in the current project.

The data gave rise to six dominant themes:

1. Impact of DPG on staff
2. Deeper level of client understanding
3. Family expectations
4. Organisational change
5. Time management
6. Communication

### Impact of DPG on staff

It was evident that staff were challenged by the DPG process with respect to gaining new insights into the capacity and potential of their clients. However, they also found the process to be empowering and professionally rewarding.

The DPG process has been found to cause staff to question their beliefs about client capacities and in some cases, staff are so challenged by the perception that 'everyone

can work', that they leave the organisation. This was most apparent at one provider participant. It highlights the known importance of having the right staff involved as well as moving on the wrong staff.

"It was the very opposite of what I knew...We're looking for something that's going to be for that person, specific for them"

"I just think that the impact of this first part of Discovery on you is quite significant and would I be right in saying that the outcomes that you would assume for clients would be so different to what you might have considered in the past?"

"I think everyone walked out really empowered and excited. Like that first meeting that we had afterwards, it was like, people throwing ideas on the front and I think that's a big benefit from the training is that we've got all these really good ideas and that's more motivating to go and do things."

These reflections by staff illustrate a higher level of engagement that DPG can bring to the employment process. The statements highlight the significant impact that DPG has on staff. Here though, it should be noted that even when properly trained in DPG, staff require ongoing support and mentorship as they develop and need higher levels of skills across employer engagement, positive behaviour support and systematic instruction. All these elements are features of The Work First™ curriculum.

#### Deeper level of client understanding

Consistent across participants was the experience of achieving deeper levels of client understanding.

"Different things that they do outside of work that we may not have been aware of before.....and you might pick up on a skill that they don't even realise that they had like getting to know them."

"I have a daughter with a disability, quite complex disability, and the thought of her being employed didn't cross my mind for an awfully long time and now I'm at a point through all of this sort of work of thinking absolutely she can work and be incredibly productive and valuable. Yeah, it's opening up that world of just possibility no matter what the disability is and who the person is that there's always something out there that they can do and be productive and get value themselves as much as anybody else."

These statement in themselves highlight the capacity of DPG to change the levels of expectation about what is possible; affirming the CE proposition of zero exclusion.

#### Family expectations

One of the critical components of CE/DPG was the involvement of family and friends in the process. This served multiple purposes - to build trust, allay fears, and assist in building a richer picture of the client.

"...most important because if we're all not on this journey, as you might call it together, it's not going to work"

“Yeah, his parents, especially his mum who has been through the journey with him of all these let-downs over the years and just trying to make it a positive experience to him that it wasn’t just going to be another ‘let’s get you out there’ put into something.”

“Pretty positive I would say. Again, people are very excited and happy that we’re doing more to find out about individuals rather than...”

Involvement of family is critical to building trust; trust that they won’t be let down again and trust that your organisation has their interest at heart.

### Organisational change

The adoption of a new practice should be transformative for an organisation; introducing new thinking and improved practices that contribute to better outcomes. However, to gain traction these new practices are, wherever possible, best scaffolded onto familiar concepts. While CE/DPG is a radical departure from the typical way in which people with disability have been supported to think about and pursue employment, it is sufficiently grounded in what is recognised as contemporary good practice such that it can be readily adopted by most service providers. It was found to have ecological validity in the view of those who were trained in the process.

“Like its common sense like I should read through this Discovery. Its stuff that should have been happening like for years when placing people with disability or whoever in jobs.”

“And as we build our resource as an organisation as well, staffing, new recruits, all of those sorts of things, it will evolve. At the moment, it is necessarily the beginning and we have to start with our group of people”.

### Time management

The application of CE/DPG within a setting was found to require a significant investment in time at the commencement but was viewed as leading to efficiencies in the longer term. Participant experience of the process suggested the need for management to provide “the space” for staff to fully embrace the process, and time to dedicate to learning and practicing the skills needed to implement the process.

“And also, the practical side of things is the fact that we’re very time poor. It’d be great to learn all these skills. The juggling of the two skills is fantastic, but in reality, you need to go however many interviews where you’re going to get that confidence to get that skills. Whereas, we don’t have the time to do that.”

“For us at the moment, it’s nothing to do with DPG itself, but some massive workload and it’s just very different to what or how we’ve done things in the past. It’s great that this is all happening. It’s just that I personally feel like I need more time to get everything done”

### Communication

Communication is an established factor in the success of any professional relationship or undertaking. Participants highlighted the importance of well-established lines of communication for addressing family concerns, and in maintaining organisational support for staff and management buy-in.

“Communicating for instance as well to the family and also managing the possible anxieties or expectations can be important in seeing the skills that you need to see and being able to see people in their best environment.”

“I think probably a lot more could have been done to have more effective awareness raising, those leaders and managers from the get go about what was involved.”

Communication is important to managing participant / family expectations as well as ensuring that the CE staff have the room to fully engage in the process.

## Conclusion

There was evidence that Disability Support Professionals involved increased their knowledge and skills in the support of people with disability requiring assistance in the area of employment / vocational support. However, for some staff the introduction of Discovery represented a substantial challenge to their perceptions of what people with disability might want and be able to pursue with respect to meaningful employment. Clearly, careful consideration needs to be given to staff profiles; as some staff appear more suited than others to working within the Discovery process. How these insights might be incorporated into staff recruitment is yet to be determined.

Time and resources needed to be committed to the introduction of this new way of working, but the longer-term benefits and potential efficiencies were evident for those involved in the process. Importantly, a commitment by organisational management and frontline leadership is essential. For these reasons, attention to organisational policy development, and not just staff training, are critical. This is a major finding of the current report, and what needs to be done with respect to organisational policy development to enable CE to have its best effect warrants further work going forward.

## 2.3 Organisational sustainability

At the time of preparing this report, data were available from four management level staff across three providers. A brief description of the three providers can be found in Table 4.

Table 4: Description of the service providers

<b>Provider</b>	<b>Brief Description (type of service, size of service, geographic location?)</b>
#1	A ‘Whole of life’ service provider
#2	An Adult Disability Employment (ADE) service in a metropolitan area
#3	A Lifestyle and Employment Service provider

Analysis of these data gave rise to seven themes:

1. Depth of DPG
2. Staff development
3. Trust
4. Organisational support
5. Organisational change
6. Communication
7. Multi-dimensional use of DPG

At the outset it quickly became apparent that some providers who had joined the project would be challenged by their involvement. Coupled with the changing NDIS environment, these factors influenced their involvement in the project.

For example, one provider reported that new clients were almost non-existent due in part to NDIS planners (wrongly) adopting a view that the NDIS doesn't fund employment and that the capacity to develop employability skills are not seen as capacity building. This provider, in recent discussions, highlighted that this attitude is still apparent and needs to be addressed by the NDIS. This same provider has subsequently reviewed their involvement in the NDIS. While staff at this service have had access to the CE training, they have not progressed the CE process. However, all other providers have progressed CE to varying degrees.

### Depth of DPG

Consistent across all participants is the capacity of DPG to provide for richer deeper understanding of clients. DPG has been likened to having a conversation with purpose and this is reflected in the following statements:

“Just those titbits of information are really helpful with understanding the person and I think that's key to the discovery program, understanding the person in a more complex way.”

“I think having such a comprehensive, practical, step-by-step model has been a really good thing for people who are now looking to implement it.”

It is clear that DPG has the capacity to enhance service delivery through organisations developing a better understanding of who their clients are, as individuals; what is important to them, their dreams and aspirations. Such depth of knowledge of individual clients, that the implementation of Discovery enables, is fundamental to the individualisation of service provision and contemporary practice in an NDIS environment.

### Staff development

The CE/DPG training was found by organisations to be comprehensive, and to address a wide range of issues relevant to building their capacity to support clients with complex needs. The extension of the classroom training to include mentorship when implementing the knowledge staff had acquired was recognised as an important

feature of The Work First™ curriculum, which distinguished it from other ‘training activities’.

“I would say that the skill development has increased significantly with the program. I mean having the confidence in order to undertake a Discovery process per se has increased significantly. Staff came up basically with very little knowledge about customised employment path from the initial training and also completely new experience for the staff involved... but as the program has progressed, there has been quite observable change in the mindset of some of the staff where they have the confidence to actually undertake the further processes.”

“I have really enjoyed the process. It’s opened my eyes to a lot of things and to a whole new world of discovery”

It was evident that staff required at least 40 hours of training (inclusive of mentorship) to begin to reach a satisfactory level of competency. This is consistent with the findings from the USA with respect to the training needed to reach the standards required of the Employment Support Professional Certification Council (ESPCC).

### Trust

Building trust was identified as an essential factor in the CE/DPG process. Organisations valued not only the training sessions, but also weekly face to face support during the intensive adoption phase, followed by bi-monthly support, video support, and monthly management meetings with providers.

“You got to fall over, you got to pick yourself up, you got to go again, but you got to keep trying. But support is there for us...”

“The ongoing support, the mentoring, just sometimes stirring in a little bit more of a direction in terms of thinking about things in a different way that have not been considered previously, I think they’d been key to be able to stir us in the right direction, to gather that useful information, to help create those sort of profiles that we can use.”

This level of support and attendant outcomes is consistent with overseas practice and is crucial to the correct adoption of true CE practice. At its core it creates trust and conditions of mutuality.

### Organisational support

The full support of the organisation, from senior management and explicitly stated in policy was considered critical to the effective implementation of CE/DPG. The staff development processes need to be accompanied by organisational development processes, that bring the whole organisation on board, and not just a few people undertaking training.

“I think first thing first, you have to commit to it and that commitment has to come from the top. It’s not for the faint-hearted. Were in a process of changing our organisation completely, the practices within our organisation, so it has to come from the top. It has to be appropriately resourced and then I think having

trusted partners for all stages. CDERP is a trusted partner that we can have someone as our guide to bring us through the process.”

“But it was even like it was quite challenging to get great coherent understanding of what it was all about even at that kind of handover point just coming into our project.”

### Organisational change

It was evident that the participating organisations experienced significant philosophical and operational challenges. This is consistent with experiences overseas. As observed earlier, the implementation of CE/DPG was found to be much more than the implementation of staff training.

“It’s a complete change for our organisation and is an ongoing change. We want to continue to improve how we operate so that means that it continues. It’s in perpetuity almost from here, but certainly in terms of embedding the change in the culture or the mindset, looking at the resources of the organisation and are they allocated appropriately, looking at policies and procedures”

“In our current stewardship of the organisation, we need to make sure it’s relevant to the community and is vibrant in that community. And so therefore, one of those changes is looking at customised employment.”

Community engagement and information forums were conducted in collaboration with some provider participants. These were particularly well received by different community cohorts that might not have traditionally utilised these provider services. In many instances, families and schools who had no previous relationship with the providers engaged with those providers, seeking support to find employment. In one instance, the community engagement was almost fully from ethnic communities.

### Communication

Consistent with the findings reported under Organisational support, communication has been illustrated as an essential ingredient to the successful uptake of CE/DPG within providers.

“Through the discovery process and certainly talking with that person more in depth and asking some occasionally probing questions, you can get a lot more information out.”

“It took a while to really understand what the “ask” was of the project and what was involved and what was this thing called customized employment. Yes, so that actual communication piece probably which is probably the how I learnt about it.”

There is little doubt that without full and complete lines of communication the uptake of CE/DPG can be stilted, if not fail.

### Multi-Dimensional Use of DPG

The adoption of the CE/DPG process for other purposes is consistent with it being a person-centred practice. In the case of this project it was used to allocate resources more effectively and to also support transition to retirement. This is consistent with the ADE Pathway Plan Model™ (APPM) that was developed separately from this project, and is being adopted as a transition model. Clearly the DPG process is a versatile and adaptable model with multiple potentials.

“We’re using it absolutely for everyone and we have an employee assistance planning process which looks like vocational and non-vocational goals for people and how do we then better support those individuals. We’ve always had that, but it lacks a little bit of flesh on the bones and discovery now, of course, we’re implementing a discovery across the organisation within a piece of planning so that even further tweaking of our resourcing and the decisions made around our finite resourcing are going to the right places just to get the biggest outcome for an individual and their family.”

“It’s not only for customised employment that I’m finding I’m getting some benefit out of the discovery process. I’m finding it in all things like transition to retirement programs for employees. I’m looking at it from a point of view of employee systems plan. You can use a discovery process as well to find out more information, to help that person achieve goals”

External to this project CDERP are using the DPG process in several different settings, with similar outcomes. Recent overseas experience has highlighted how the use of DPG as a tool to support non-work-related activities supports engagement and person-centred philosophies within providers that seek a greater understanding of the client beyond employment. The participant quotes in this section support that approach.

## Conclusion

There was evidence that the implementation of CE/DPG was not only transformative for staff, but also of organisations. Considering the comments from organisational leadership, it was evident that the process had increased the awareness that services had of the needs and aspirations of their clients and sensitised them to the support needs of their staff in the implementation of authentic person-centred practice.

However, it was evident that organisations needed to develop a strong policy position that clearly articulated the principles and practices of Customised Employment; it could not simply be implemented as a staff training adjunct to ‘business as usual’. Also, it was evident that there needed to be an investment in front-line leadership, with an emphasis on growing mentorship capacity. Such findings have implications for recruitment of new staff going forward.



## 3. Reflections

### 3.1 Reflecting on implementation

*Engaging stakeholders: What were the most useful strategies you used to engage and communicate about the project? How/why were they successful? What would you do differently?*

Engaging stakeholders requires more than simply expecting staff to adopt and implement the CE/DPG process with any intent. Evidence from this project, consistent with overseas experience, highlights the need to have a dedicated person right from the start, along with the capacity of senior management to actively support and engage with participants. A 'whole of organisation' awareness and clearly articulated policy support is essential for the project to embed itself and to survive.

Community forums are an effective method for engaging the wider community in the process. This has benefits for facilitating employment outcomes for individual clients, and for supporting the organisation to become part of the wider community - not simply the disability community. This could be an important contributor to organisational longevity in an individualised funding environment (Hall, Butterworth, Winsor, Kramer, Nye-Lengerman, & Timmons, 2018).

As part of the current project several community forums were conducted in collaboration with the partner organisations. These included: two 3-hour public meetings and information sessions for families and the wider community held at both Melbourne and Canberra; and a 3-day workshop at Melbourne for families on implementing Self-guided Discovery in preparation for NDIS planning meetings.

*How appropriate was your initial concept? What/did you change or adapt along the way and why?*

The initial concept is appropriate, however what is important is a willingness by organisations to fully commit time, staff and resources. It is vitally important to develop a clear relationship with all staff and management so that any barriers can be addressed promptly. It is clear that embedding CE in an organisation requires a fuller engagement with internal stakeholders prior to staff involvement, as the CE process is not simply about training staff to undertake employment support activities, but about organisational and cultural change.

As the process unfolded, an increasing amount of time was given to supporting senior management to establish systems to support the staff as they undertook the training, to better enable them to make use of the training. Establishing such policies and procedures, and an operational environment conducive to implementing CE prior to training staff was a major learning from this project.

### 3.2 Reflecting on impacts and outcomes

*What are the top two or three things you have learned from doing this project?*

Clear management directive and not tokenism, and the requirement that organisations invest fully in the process will be important for the successful implementation of CE/DPG. This is consistent with overseas experience, and further supports the universality of the processes used in this project.

Furthermore, without support, staff when confronted with barriers revert to old habits, shortcutting the process and setting up conditions for failure. This supports the need to fully train staff consistent with international evidence and that the provision of ongoing support and mentorship from properly qualified personnel is an essential ingredient to the correct adoption of CE processes that maintain fidelity to the process.

*Have there been any outcomes that have surprised you?*

The impact and rapid use of DPG with other cohorts external to the providers' normal client base have highlighted a positive unintended consequence of the project. This factor has highlighted and reinforced the need to engage management fully and the necessity of facilitating internal barrier identification and the capacity to support management, practice and policy revision and change.

*Were there outcomes that you expected to see, but didn't?*

The outcomes seen were consistent with international experience and evidence. However, given the delayed timeline for starting that was interrupted by the Christmas break and the known timelines for satisfactory completion of the CE processes, it isn't surprising that employment outcomes are only occurring after the project ends. Coupled with the organisational change process, cultural shift and change in beliefs that underpin staff work, initial progress is consistent with past experiences. To gain a better understanding of the change process, a further study beyond this funded project is needed.

*How did you measure success? How well did this capture project outcomes? Is there other information that would have provided a better understanding of outcomes?*

The project is ongoing. However, success can be measured by staff retention and involvement, client satisfaction and eagerness to remain involved, ongoing provider commitment and the reflection by providers that this is a long-term exercise due in part to organisational change being part of the process of evolving to meet the NDIS market and community demands. Overall, staff expressed a desire to continue with the mentorship program which signalled that they valued the process and could see emerging outcomes for their clients. A full-scale implementation would benefit from a formal cost-benefit analysis.

### 3.3 Reflecting on context: what worked, for whom and in what circumstances?

*What worked well to support the achievement of your intended outcomes? In what situations did it work well?*

The capacity to mentor staff beyond the initial training was found to be a critical element of success. Both staff and management identified this as important, and a

feature that distinguished the program from other training staff had undertaken. Overall success was most evident where there was clear buy-in and support from senior management (including CEO involvement in the training program).

*What didn't work so well in your project? In what situations didn't it work so well, and why?*

The implementation of the CE/DPG process was hindered where it was conceptualised by providers as simply a staff training exercise conducted in relative isolation to the operation of the wider service. Also, access to clients for the implementation was in some places impeded by the lack of clients with employment support included in their NDIS plans. Here it should be noted that less than 3% of the current NDIS plans include provision for the support of 'economic participation' (NDIS Quarterly Report, March 2018).

*Knowing what you know now, what would you do differently?*

Closer attention needs to be paid when engaging staff to undertake the training. It would be prudent to develop a profile of pre-requisites to assist organisations select 'the right staff'. Also, the availability of staff needs to be established prior to commencing the program. Given the intensity of the training, and the need for staff to focus on the initial implementation of the program with new clients, it would be prudent to have negotiated for staff to have been taken offline from their usual duties, to have allowed them to gain the full benefit of the training.

Community engagement forums could have commenced from the outset and embedded in the program.

### 3.4 Reflecting on legacy: how sustainable are the innovations demonstrated?

*Are you planning to continue with any of the practices or initiatives you tested during the project? Which practices and what will it require to continue with this approach?*

All processes used in The Work First™ Curriculum program continue to evolve out of evidence from working with this cohort and other groups domestically and internationally. They continue to build on the strong research base that we have and utilise to support The Work First™ Curriculum. This project highlighted the importance of a whole of organisation approach to adopting CE/DPG in the context of Australia and the NDIA.

Continuation of the adoption of these processes will require clear support from the NDIA in order for more providers to participate with appropriate acknowledgement and guidance to planners that employment is capacity building and that the NDIA is not a pathway to another government program, but a pathway of the participants choosing.

*Please explain how the changes you undertook can be sustained within the NDIS pricing framework?*

Currently the NDIA pricing guide has very limited funding lines that support economic participation. The NDIA needs to adopt more fluid funding and apply directives to planners and the LAC network that economic participation is vital to capacity building and fundamental to the exercise of choice and control for clients of the NDIS.

*Is the approach you trialled suitable to be replicated or adapted by other disability service providers? If yes, what types of service providers would be most likely to benefit and what would they need to do?*

The Work First™ Curriculum model is based on extensive evidence and practice internationally. It is being used and adapted to a wide variety of participants with barriers to employment, not simply people with a disability.

The only barrier to adoption by the broader community is the absence of awareness and the reluctance of providers to truly adapt and innovate. The evolution of the NDIS and provider capacity to engage it properly will require providers to fully invest in staff and programs that meet the client needs and respect person-centred practice. Anecdotal evidence to date suggests that providers are trying to fit the NDIS into their methods (Smith, Rhodes, Newton and McVilly, 2017). Providers that are undertaking innovative approaches are investing and progressively seeing the rewards.

## 4. An overview of Customised Employment

Customised Employment (CE) is a model of engagement that focuses on bringing people together to negotiate an employment opportunity or a career path. It is not an employment agency, nor is it a job search website. It is a person-centred process that focuses on abilities and common interests of employees and employers and attempt to find an economic solution suitable to all parties.

“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, designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer” (Civic Impulse, 2015, as cited in Jorgensen Smith, Dillahunt-Aspillaga, & Kenney, 2017, p. 195)

### Principles of Customised Employment

The process of CE starts from three fundamental principles (Griffin, Hammis, & Geary, 2007):

1. *Every person is employable in an open employment environment*

The first principle centres on the belief that society creates the barriers that exacerbate the impact of an impairment. If society is the problem, then changing the construct of the environment is society's responsibility.

2. *Persons with disabilities, particularly complex disabilities are disadvantaged by traditional competitive employment methodology*

The second principle comes from a critique of traditional job seeking methods. Finding a job opportunity, making a written application and waiting for a reply has traditionally provided poor outcomes for persons with disabilities. Firstly, the written application needs to be understood for what it is, a method used by employers to exclude the majority of applicants. Secondly, the proposition of disclosure will become a greater issue of significance using a written resumé and thirdly, the applicant under these circumstances, can't get to show the skills and abilities that will become the major determinant in a positive employment outcome.

3. *It's all about the person/s*

The third and final principle defines the critical element of any successful position of sustainable employment – the quality of the relationship between the job seeker and the potential employer. Relationships cannot be established on paper, they can only be developed when key questions about the key individuals are answered and the participants are encouraged to meet in circumstances that will enhance a quality conversation.

## The process of Customised Employment

The underlying process of CE is known as Discovery. In the 1990's, rather than continually using comparative quantitative assessments to drive employment, the method of Discovery was proposed as an alternate qualitative technique to gather the information necessary to guide the employment pathway (Callaghan, Griffin, & Hammis, 2011).

Discovery is characterised by the following concepts:

- seeks to identify existing information rather than creating information to formulate a new evaluation or diagnosis
- creates a direction for employment possibilities based on a translation of the person's existing life experiences
- finds the ecological validity for actions and skills rather than predicting potential from a functional assessment
- reveals information which can be used as a guide for job matching not as a method of exclusion
- encourages a 'buy-in' at all levels and empowers families, friends and community members to be part of the solution-based framework

Discovery is an in-depth, person-centred investigation of the individual's life and seeks to find key information, skills, interests and abilities that are expressed in many ways through a range of diverse environments. Trust is placed in the narratives told by people of significance, to cross-reference information which is aimed at answering two important questions: *who is this person;* and *what are their ideal conditions for employment?*

Discovery's strength also resides in its desire to respect the rights of the individual by developing self-advocacy skills through the process of self-determination. The ability to self-determine through a range of personal goals, including employment has been shown to support better medium- to long-term outcomes and an increased chance for independent living (Shogren, Wehmeyer, Palmer, Rifenbark, & Little, 2015). It also develops the skills of self-regulated problem solving leading to better decision making, career and job development (Dean, Burke, Shogren, & Weymeyer, 2017).

As a tool to support transition planning, Discovery has showed early promise. When compared to more traditional methodology for transition planning, the flexibility of the qualitative person-centred approach of Discovery appears to provide some advantage (Jorgensen Smith, Dillahunt-Aspillaga, & Kenney, 2015; Molina & Demchak, 2016; Stevenson & Fowler, 2016). These however are small studies and more data is required with larger participation rates to validate the strength of these findings. In a larger 5 years study, Rogers, Lavin, Tran, Gantenbein and Sharpe (2008) used customised employment to transition 475 young people in seven school districts. At the completion of the study, 62% of these students had achieved individualised job placements at a competitive wage.

## From Discovery to employment opportunity

Although an important and effective tool for job development, Discovery alone provides very little in securing a place of employment. For CE to be effective, Discovery must provide the direction for job developers when designing their job search strategy. It provides guidance towards employment environments that are ecologically aligned with the person's skills, interest and abilities. However, synthesis of the Discovery profile into meaningful data requires well-trained staff with a high level of competency (Harvey, Szoc, Dela Rosa, Pohl, & Jenkins, 2013).

Synthesis of Discovery information is done through a thematic review of the data. Those facilitating the process therefore need to be trained as scientist-practitioners. Emerging themes become transparent as layers of information are reviewed.

In the GHA methodology adopted in this project, three vocational themes are generated for each person. Themes are broad categories of interest, they are not jobs or job descriptions. Themes could include: animals, transport, tinkering, assembly, ordinance, care, etc. The challenge for the job development team is to assess the types of workplaces that would require these skills. Under GHA methodology each theme should generate a minimum of twenty workplace options. Thus, three emerging themes should generate approximately 60 workplace descriptions. It is these descriptions, that set job development in motion. Authentic themes cannot be established without a rigorous period of Discovery (Griffin et al., 2007; Griffin, Hammis, Keeton, & Sullivan, 2014).

This methodology therefore highlights four major points: (a) person-centred data drives job development; (b) the individual is always central to any decision-making; (c) the job development team cannot simply use the next job vacancy as an employment option; and (d) CE meets the UNCRPD charter for respecting the rights of the individual during their employment and career development.

Gathering critical information about potential employers increases the chances of a successful placement. Just as CE uses the person-centredness of Discovery to determine the interests, skills and abilities of the job seeker, CE also respects the needs of the employer by conducting a range of conversational style meetings to determine: who is this employer; and what are the requirements of this business that can lead to a successful business case for employing this individual?

One of the significant differences with CE, is that it respects both the employee and the employer in the negotiation process. A good relationship that is mutually beneficial to both parties is desirable for a sustainable future. To assist in attaining this outcome, techniques such as Informational Interviews are used. These conversations are designed to gather information, not to secure a job. They are extensive and provide the opportunity for the employer to tell the stories behind their business, take the job seeker on their journey and outline expectations for employment. Apart from sharing key information in the development of a business case for employment, this conversational interview also determines the suitability of this employer for our job seeker. Essentially, this is just as much a 'candidacy interview' for the employer as it is about a place of work. Informational Interviews also take away the inappropriateness of asking for a job without any understanding of the environment the job seeker will be entering (Harvey et al., 2013).

## Customised Employment as an evidence-based process

“There are no shortcuts in Customised Employment because Customised Employment is the shortcut!” (Cary Griffin, Lochsa Lodge, Idaho, presentation, August 27, 2017).

Good job development should always be embedded in good, evidence-based, practice (Inge, Graham, Brooks-Lane, Wehman, & Griffin, 2018). Customised Employment is based on sound evidence-based principles and good training programs that provide ongoing support to service providers and also families (Harker & Desenberg-Wines, 2017). However, the evidence-base is not large, and requires more research to identify why key parts of the process should always be followed.

In 2018, Inge et al. reported the results from a survey of 28 national experts on CE. The aim of the survey, conducted across a number of states in the USA, was to elucidate key elements of CE practice and to discuss the way future research could help add empirical evidence to the efficacy of these processes. A thematic analysis was completed of the phone conversations which led to the creation of twelve key elements of CE practice (see Box 1). These 12 elements represent good practice for CE, from Discovery through to employer engagement, development of supports, social networking, family education and planning and career development.

### Box 1. Customised Employment: Key Elements of Good Practice

1. Physically meet at a location of the person's choice
2. Build rapport and get to know the person
3. Mindfully listen to the person
4. Identify the person's interests, skills and abilities
5. Conduct in-depth interviews with family and friends concerning the person's interests, skills and abilities
6. Observe the person in daily activities in a number of different community settings
7. Arrange for the job seeker to observe the local businesses that potentially match the job seeker's interests, skills and abilities
8. Conduct informational interviews with employers at local businesses that are representative of the job seekers interests, skills and abilities
9. Observe the job seeker engaging in a job-related task
10. Assist the job seeker in identifying a work experience(s) to refine /identify job interests, skills and abilities
11. Collaborate with the job seeker, family and friends in confirming the job seekers 's interests, skills and abilities
12. Negotiate a customised job description

Currently there is a paucity of evidence elucidating how and why each of these elements are deemed essential. This paper's aim was to highlight these points and encourage future research to undertake the challenge of adding to the evidence-base. Riesen, Morgan, and Griffin (2015) report similar findings from a review of the literature. They highlighted areas such as: participants and settings; intervention v outcome measures; fidelity of CE; social validity measures; and appropriate data collection including longitudinal data, as areas requiring further research.

## The Future of Customised Employment

Customised Employment is an established person-centred process based on good published evidence. It is also in a process that has continued to evolve from the early 90s to current day practice. The opportunity exists to develop the evidence-base with further empirical research, building on a promising period of development. Just as important for Australia, the current process of Customised Employment is consistent with our legislative obligations under the UNCRPD and NDIS Act (2013). Future policy needs to be guided by a commitment to both of these important parameters.

## The Work First™ Customised Employment curriculum.

An overview of the curriculum and associated learning outcomes are appended to this report. Figure 1 includes the key components of the curriculum

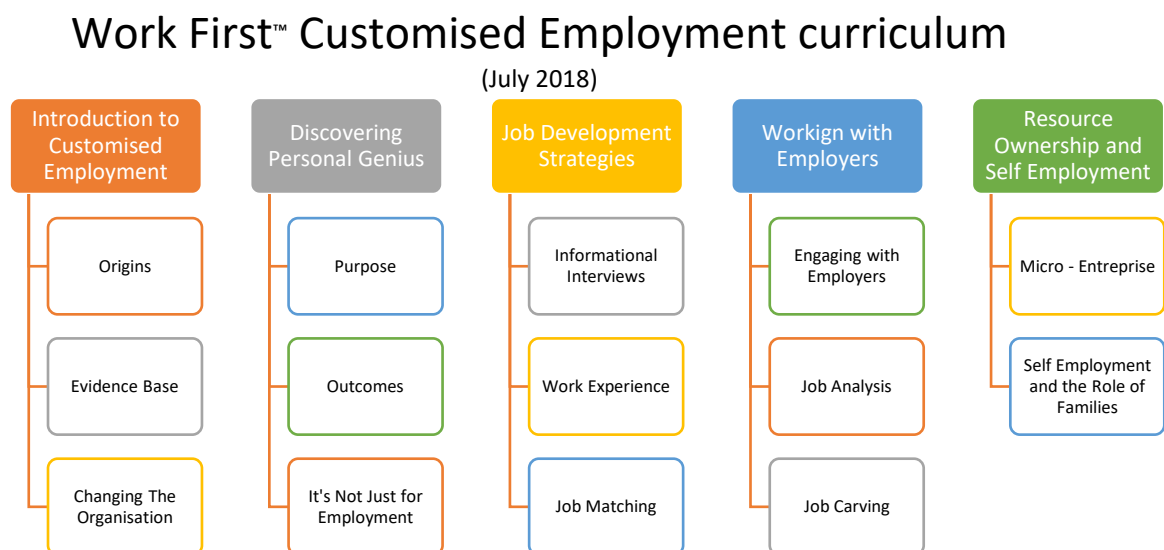


Figure 1: Key components of the Work First™ Customised Employment curriculum

**Note:** In addition to class-based knowledge acquisition, students undertake supervised field work to consolidate and extend their learning. These activities include both engaging with businesses to investigate the employment possibilities in a local community, and focused job placement activities with individual clients.



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## 6. Appendices

Appendix 1: Plain Language Statements & Consent Forms

Appendix 2: Work First™ Customised Employment Program Outline

Appendix 3: Customised Employment Video Interviews

Appendix 4: Work First™ Customised Employment Curriculum Outline

Appendix 5: Discovery Services Fidelity Scale – example from the original version

Appendix 6: Interview Guides





## PLAIN LANGUAGE STATEMENT

***To be read to and discussed with the person with disability considering participation, by a person they know and trust***

**Date:** September 2017

**Full Project Title:** Customised Employment: building workforce capacity for, and establishing an evidence-based means of achieving the social and economic participation of people with disability

**Principal Researchers:** Professor Keith R. McVilly, Mr Peter Smith, Mr Peter Rhodes, Mrs Lauren Pavlidis

**HREC ID:** 1750291

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### **Why have you been invited to participate in this research project?**

You (or a member of your family with disability) has asked for support to find a job.

This project is finding out if a new way to help people with disability find a job might work in Australia. It is called *Discovery*.

The project is run by Professor Keith McVilly, Mr Peter Smith, Mr Peter Rhodes, and Mrs Lauren Pavlidis.

We have been paid to do the project with money from the government; a *National Disability Services Workforce Innovation Grant*.

What we are going to do has been checked out by the University of Melbourne Human Research Ethics Committee. They said it was safe to do the project.

### **Why is this research being conducted?**

Lots of people find it hard to get a job. People with Disability find it very hard to get a job.

The National Disability Insurance Scheme (NDIS) wants people with disability to get a job.

We know that many people with disability in the United States of America (USA) have got a job by using the *Discovery* programme.

We want to know if the *Discovery* programme might work in Australia.

**What will I be asked to do, and are there any risks or benefits?**

If you say YES to being involved with the project, you will be supported by a Disability Worker who has been trained to use *Discovery* – they will be your ‘job coach’.

Your job coach will work with you for about 6 months.

Your job coach will visit you at your house. They will also visit you at other places you think might be important – like where you work now, or where you go to have fun.

Your job coach will talk to you. They will talk to people who know you well, like your family. They will talk about the things you like doing now. They will talk about the things you might like to do in the future. They will talk about the things you are good at doing. They will talk about the supports you might need to get and keep a job. They will write all this down in the *Discovery Plan*.

Your job coach will use the *Discovery Plan* to try to find you a job. Your job coach cannot promise that you will get a job. But your job coach will try their very best.

We will read the *Discovery Plans* that you and your job coach write. We will talk to your job coach about your *Discovery*. We will talk to you and your family about your *Discovery* programme. When we talk to you, we will record what is said so we make sure we get it right. If you get a job, we would also like to talk to your boss.

If you want to stop at any time, you can say “STOP”. It is your choice. You do not have to keep going with the *Discovery* programme. You do not have to talk to us.

If you stop the programme, you can go back to whatever programme, activity or work you were doing before you started.

If you become up-set or distressed, you will be supported to contact your organisation’s Employee Assistance Programme. You could also ask to speak with your General Practitioner (GP), or your Case Manager.

**How long is my participation expected to take?**

The programme will take about 6 months. This will include meetings and trying out for new jobs. We hope that you will have a job by the end of the programme. But we cannot guarantee a job.

**How will my confidentiality be protected?**

What you tell us will be private and confidential. We will not tell other people what you said. When we write-up our report on what people told us, we will write it in a way, so people should not know who said what to us. However, people who know you well might recognise some of the things in the report as something you said or did.

If we think you are in danger, we will need to tell someone who can protect you.

**Do I have to take part?**

It is your choice. You can say YES or NO.

If you say NO, you can go on with whatever programme, activity or job you currently do. Or you can go to another job search programme.

If you start the programme, you can decide to STOP at any time. If you stop the *Discovery* programme, you can go on with whatever programme, activity or job you currently do. Or you can go to another job search programme.

**What happens after the project is finished?**

After the project is finished, we will send you a summary of what we found. We will talk to people at conferences and meetings about what we found.

We will write about what we found and send a report to the government. But we will never tell people your name or where you live or work.

We will keep your information in locked filing cabinets or on a password protected computer file for use in future projects that are closely related to this project, or in the same general area of research as this project.

**What if you have Questions or Complaints?**

If you have any questions or concerns about the project, please contact: Professor Keith R. McVilly

School of Social & Political Sciences, The University of Melbourne Tel. 03 8344 5366; or

E-mail [keith.mcvilly@unimelb.edu.au](mailto:keith.mcvilly@unimelb.edu.au)

If you would like to volunteer, please return the attached Consent Form, signed and with your contact details electronically to: E-mail [keith.mcvilly@unimelb.edu.au](mailto:keith.mcvilly@unimelb.edu.au)

If you have any complaints about any aspect of the project, the way it is being conducted, or any questions about your rights as a research participant, then you can contact:

The Manager, Office for Research Ethics & Integrity Telephone: +61 3 8344 2073

Email: [humanethics-complaints@unimelb.edu.au](mailto:humanethics-complaints@unimelb.edu.au); Quoting the HREC Reference Number: 1750291



## CONSENT FORM

**To be read to and discussed with the person with disability considering participation, by a person they know and trust**

**Date:** September 2017

**Full Project Title:** Customised Employment: building workforce capacity for, and establishing an evidence-based means of achieving the social and economic participation of people with disability

**Principal Researchers:** Professor Keith R. McVilly, Mr Peter Smith, Mr Peter Rhodes, Mrs Lauren Pavlidis

**HREC ID:** 1750291

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**Name of Participant:** \_\_\_\_\_

1. I want to look for a job.
2. I want to be in the *Discovery* programme, to help me get a job.
3. I know that the *Discovery* programme cannot promise me a job, but that my Job Coach will try hard to get me a job.
4. I know that people will come to talk to me about what I did in the *Discovery* programme. They will write down what I say and record it too.
5. I know that people will want to talk to my family and others who were involved in the *Discovery* programme, about how it worked for me. What they say will be written down and recorded.
6. I know that people will want to read my *Discovery Plan*.
7. What people say and what is written down will be private and confidential, unless people think I am in danger. If people think I am in danger, they will get me help.
8. I can ask questions at any time.

9. I know I can say STOP at any time. If I say STOP, I can go on with whatever programme, activity or job I was doing.
10. I know that my information will be kept in locked filing cabinets or on a password protected computer file for use in future projects that are closely related to this project, or in the same general area of research as this project.

**Participant Signature:**

**Date:**

**Participant Phone No.:**

**Participant Organisation:**

**Address:**

**Support Person Name & Signature:**

**Date:**

**Support Person Phone No.:**



## PLAIN LANGUAGE STATEMENT

**Date:** September 2017

**Full Project Title:** Customised Employment: building workforce capacity for, and establishing an evidence-based means of achieving the social and economic participation of people with disability

**Principal Researchers:** Professor Keith R. McVilly, Mr Peter Smith, Mr Peter Rhodes, Mrs Lauren Pavlidis

**HREC ID:** 1750291

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### **Why have you been invited to participate in this research project?**

As a Disability Support Professional working with people with disability who are seeking employment, you are invited to participate in this project. The project is being conducted by Professor Keith McVilly, Mr Peter Smith, Mr Peter Rhodes, and Mrs Lauren Pavlidis. It has been funded by a *National Disability Services Workforce Innovation Grant*. The research protocol has been reviewed and approved by the University of Melbourne Human Research Ethics Committee.

### **Why is this research being conducted?**

This project will develop, demonstrate, and test a new model of employment support for people with disability in Australia (called *Discovery*). It will do this by using the principles and practices of *Customised Employment* (CE). CE is widely used in the USA, where it is understood to be: “*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*”. CE, and in particular *Discovery*, is therefore a process closely aligned with the intentions of the Australian National Disability Insurance Scheme (NDIS). However, we need to know if, and if so how *Discovery* could be best adapted for, and applied in the Australian labour market.

### **What will I be asked to do, and are there any risks or benefits?**

If you agree, you will participate in a *Customised Employment* training and mentorship programme, which will introduce you to the *Discovery* process. It will consist of approximately 25 hours of training, conducted during your usual working hours (i.e., paid hours), over a

month-long period. In addition, there will be an opportunity to meet with a mentor on several occasions in the 3-months following the training.

After the training, and during the 3-months mentorship, you will begin to work with clients to implement *Discovery*. It is anticipated you will work with about 3 clients from your organisation over a six-month period. You will be supporting them to look for and secure paid employment, or possibly to establish a small business enterprise of their own. The work load will be negotiated with your employer, as part of your usual roster of work.

As part of the project, you will participate in two individual interviews. The first at the end of the training and mentorship programme, and the second when you have completed the implementation of *Discovery* with your allocated clients. The interviews will last for up to one hour. They will focus on your experience of learning about and implementing *Discovery*; the barriers and facilitators, and any recommendations you have for improvement. The interviews will be audio recorded for later analysis.

The documentation developed by you while working with clients (i.e., the *Discovery Profile* and *Customised Employment Plan*) will also be reviewed by the research team, using a standard measure called the *Discovery Fidelity Scale*. You will be provided with individual feedback on this process.

All feedback will be based on 'good practice' in adult learning and human resources management; i.e., it will emphasise 'good practice' and 'opportunities to improve practice'.

All information provided by you, and all mentorship discussions, will be private and confidential. We will not provide identifiable information about you to your employer, unless you expressly allow us to do so. However, if the researchers believe you require additional support, or become aware of any breach of professional practice, these matters will need to be discussed with you and your line manager.

In some instances, the clients you work with might not secure paid work. This is recognised to be a potential outcome and will in no way be interpreted to reflect on your professional skills or to adversely affect your current employment.

If your involvement in the programme causes you any distress, you will be advised to access your organisation's Employee Assistance Programme. Alternatively, you could contact your General Practitioner for advice and referral.

### **How long is my participation expected to take?**

The programme will take about 6 to 9 months. This will include the initial 25 hours of training conducted over the first month, the 3-months of mentorship, and additional time spent working with clients.

### **How will my confidentiality be protected?**

We will protect your anonymity and the confidentiality of your questionnaire, mentorship discussions, and interview responses to the fullest possible extent within legal limits. Your name and contact details will be kept in a password-protected computer file. The data will be kept securely by the university for five years from the date of publication of the report,

and will be destroyed after that time. At no time will we publish your name, or release information intentionally identifying you or your organisation. Every attempt will be made to keep the identity of individuals confidential. However, it should be noted that given the relatively small number of people anticipated to participate in this study, people reading publications who know you might be able identify some of your information.

### **Do I have to take part?**

Participation is completely voluntary. Should you wish to withdraw at any stage, or to withdraw any unprocessed data you have supplied, you are free to do so without prejudice to your relationship with the university or your employer. However, once data has been incorporated into the analysis for the report, it will not be possible to withdraw data, as it will no longer be identifiable.

### **What happens after the project is finished?**

The results of the project will be disseminated in a report, and by means of peer reviewed publications. A brief summary of the research findings will be made available to you. It is possible that the results will also be presented at academic and industry-relevant conferences. At no time will the interview transcripts or audio recordings be made available to persons other than the identified researchers. We will keep your information in locked filing cabinets or on a password protected computer file for use in future projects that are closely related to this project, or in the same general area of research as this project.

### **What if you have Questions or Complaints?**

If you have any questions or concerns about the project, please contact: Professor Keith R. McVilly

School of Social & Political Sciences, The University of Melbourne Tel. 03 8344 5366; or

E-mail [keith.mcvilly@unimelb.edu.au](mailto:keith.mcvilly@unimelb.edu.au)

If you would like to volunteer, please return the attached Consent Form, signed and with your contact details electronically to: E-mail [keith.mcvilly@unimelb.edu.au](mailto:keith.mcvilly@unimelb.edu.au)

If you have any complaints about any aspect of the project, the way it is being conducted, or any questions about your rights as a research participant, then you can contact:

The Manager, Office for Research Ethics & Integrity Telephone: +61 3 8344 2073

Email: [humanethics-complaints@unimelb.edu.au](mailto:humanethics-complaints@unimelb.edu.au); Quoting the HREC Reference Number: 1750291



## CONSENT FORM

**Date:** September 2017

**Full Project Title:** Investigating good practice in promoting and supporting employment for people with disability across Australia

**Principal Researchers:** Professor Keith R. McVilly, Mr Peter Smith, Mr Peter Rhodes, Mrs Lauren Pavlidis

**HREC ID:** 1750291

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**Name of Participant:** \_\_\_\_\_

1. I consent to participate in this project, the details of which have been explained to me, and I have been provided with a written plain language statement to keep.
2. I understand that the purpose of this research is to develop and demonstrate a new model of employment support for Australia, using *Customised Employment*. I also understand that my participation in this project is for research purposes only.
3. I acknowledge that the possible effects of participating in this research project have been explained to my satisfaction.
4. In this project I will be required to participate in an interview and answer questions appropriate to this research.
5. I understand that my interview will be audio recorded for the purpose of transcription and analysis.
6. I understand that my participation is voluntary, and I am free to withdraw at any time without explanation or prejudice and to withdraw any unprocessed data that I have provided.

7. I understand that the data from this research will be stored securely at the university and will be destroyed after 5 years.
8. I have been informed that the confidentiality of the information I provide will be safeguarded subject to any legal requirements; my data will be password protected and accessible only by the named researchers.
9. I understand that given the small number of participants involved in the study, it may not be possible to guarantee my anonymity in all circumstances.
10. I understand that after I sign and return this consent form, it will be retained by the researcher.
11. I understand that my information will be kept in locked filing cabinets or on a password protected computer file for use in future projects that are closely related to this project, or in the same general area of research as this project.

**Participant Signature:**

**Date:**

**Participant Phone No.:**

**Participant Organisation:**

**Address:**



## PLAIN LANGUAGE STATEMENT

**Date:** September 2017

**Full Project Title:** Customised Employment: building workforce capacity for, and establishing an evidence-based means of achieving the social and economic participation of people with disability

**Principal Researchers:** Professor Keith R. McVilly, Mr Peter Smith, Mr Peter Rhodes, Mrs Lauren Pavlidis

**HREC ID:** 1750291

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### **Why have you been invited to participate in this research project?**

You recently employed a person with disability, participating in pilot program investigating the application of *Customised Employment* in Australia. The project is being conducted by Professor Keith McVilly, Mr Peter Smith, Mr Peter Rhodes, and Mrs Lauren Pavlidis. It has been funded by a *National Disability Services Workforce Innovation Grant*. The research protocol has been reviewed and approved by the University of Melbourne Human Research Ethics Committee.

### **Why is this research being conducted?**

This project is will develop, demonstrate, and test a new model of employment support for people with disability in Australia (called *Discovery*). It will do this by using the principles and practices of *Customised Employment* (CE). CE is widely used in the USA, where it is understood to be: “*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*”. CE, and in particular *Discovery*, is therefore a process closely aligned with the intentions of the Australian National Disability Insurance Scheme (NDIS). However, we need to know if, and if so how *Discovery* could be best adapted for and applied in the Australian labour market.

### **What will I be asked to do, and are there any risks or benefits?**

If you agree, you will be asked to participate in an interview. The interview will last for up to 1 hour. It will ask about your experience of employing the person with disability who came to

you as part of the Customised Employment programme; barriers, facilitators and your recommendations for any improvements to the programme. We will take notes and audio record the interview.

All information provided by you will be private and confidential. We will not provide identifiable information about you to your employee, or to the job coach involved in the programme, unless you expressly allow us to do so.

In some instances, the person who came to you for work might not have been able to sustain their job. This is recognised to be a potential outcome and will in no way be interpreted to reflect on your business. We are however, very interested to find out about any job placements that did not work out as planned. This information is very important to future planning.

### **How long is my participation expected to take?**

The interview will last for up to 1 hour.

### **How will my confidentiality be protected?**

We will protect your anonymity and confidentiality to the fullest possible extent within legal limits. Your name and contact details will be kept in a password-protected computer file. The data will be kept securely by the university for five years from the date of publication of the report and will be destroyed after that time. At no time will we publish your name, or release information intentionally identifying you or your organisation. Every attempt will be made to keep the identify of individuals confidential. However, it should be noted that given the relatively small number of people anticipated to participate in this study, people reading publications who know you might be able identify some of your information.

### **Do I have to take part?**

Participation is completely voluntary. Should you wish to withdraw at any stage, or to withdraw any unprocessed data you have supplied, you are free to do so without prejudice to your relationship with the university, the programme, or your organisation. However, once data has been incorporated into the analysis for the report, it will not be possible to withdraw data, as it will no longer be identifiable.

### **What happens after the project is finished?**

The results of the project will be disseminated in a report, and by means of peer reviewed publications. A brief summary of the research findings will be made available to you. It is possible that the results will also be presented at academic and industry-relevant conferences. At no time will the interview transcripts or audio recordings be made available to persons other than the identified researchers. We will keep your information in locked filing cabinets or on a password protected computer file for use in future projects that are closely related to this project, or in the same general area of research as this project.

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If you would like to volunteer, please return the attached Consent Form, signed and with your contact details electronically to: E-mail [keith.mcvilly@unimelb.edu.au](mailto:keith.mcvilly@unimelb.edu.au)

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## CONSENT FORM

**Date:** September 2017

**Full Project Title:** Customised Employment: building workforce capacity for, and establishing an evidence-based means of achieving the social and economic participation of people with disability

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7. I understand that the data from this research will be stored securely at the university and will be destroyed after 5 years.
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**Participant Signature:**

**Date:**

**Participant Phone No.:**

**Participant Organisation:**

**Address:**



“Customised Employment works because the focus is on one person at a time . . . one business at a time.”

# Customised Employment

Work First™ Customised  
Employment Program  
Outline

Centre for Disability Employment Research  
and Practice

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## **Who is the Centre for Disability Research and Practice?**

The Centre was established to provide a singular focus on improving the evidence-base for disability employment practice within Australia. We believe that for employment outcomes to improve, there must be a shift to a whole of life approach for people with a disability. Current disability employment practice centred on economic philosophy fails to recognise employment as one part of a larger picture.

To achieve change, we're gathering like-minded practitioners and researchers to work on the issues and develop the evidence-base to support change in disability employment practice. We draw on resources locally and internationally to ensure that our work meets the standards for critical peer review.

The Centre conducts research, advocacy and training that focuses on policy and practice change through advising business and government on policy and practice direction based on rigorous research. Training that starts with organisational change that supports real change and staff practices to provide better client outcomes that are based on the best available evidence. We also work with individuals and families to promote self-determination and self-advocacy focused on employment.

The evolution of employment services under the paradigm shift of the NDIS, and the move to client choice and control will require organisations to create individual solutions unique to their setting. In a sense this is the same process that clients will demand of service providers; unique, individualised custom solutions that meet their dreams, expectations and future career goals.

These solutions aren't found in repeating the past, nor are they found by throwing everything that you've done out and starting again. That's a sure-fire way to create a level of anarchy and uncertainty that will inevitably destroy your organisation. Not a good outcome! Using and extensive overseas network, international experience and a robust research foundation to work with organisations, staff, clients and families will create a vibrant future.

You need solutions based on research that informs practice, tinged with practical experience to ensure that it works! Add to this the steady progression of DES towards real choice and control; it isn't difficult to envisage a different future for disability employment. Real choice, real control and real portability that will usher in demands for a new type of service that isn't merely about a job, but one that is individually meaningful, promotes self-determination and supports real inclusion and community cohesion.

### **Introduction to Customised Employment.**

The adoption of Customised Employment (CE) by an organisation as its method of delivering employment services creates a meaningful change in thinking within the organisation. CE at its heart is a person-centred process that puts the client in control and allows for a deeper understanding of the client through rich and detailed conversations – conversations with purpose!

It is not simply a case of training staff in a new method; it is about supporting the organisation, staff, employees and community along what is a rewarding journey that will see new relationships formed and old ones taken to new levels of engagement.

It is for this reason that the adoption of Customised Employment requires a long-term vision and a trusted partner to support your journey, a journey that takes a minimum of two years.

### **What is Customised Employment?**

The term 'Customised Employment' originated during a series of discussions within the Clinton administration's then Committee for People with Disabilities. This later became known as the Office of Disability Employment Policy (ODEP), a part of the US Department of Labor formally creating a permanent focus on disability employment in 2001. In 2001, ODE funded its first grants to validate Customised Employment as an effective workplace practice for employing people with a disability previously perceived as not employable.

Customised Employment works because it is not a program, but a set of universal principles and strategies specifically designed to support both sides of the labor force. For the job candidate, the process considers the whole person — his/her skills, interests, abilities, and conditions necessary for successful employment, including job support. For employers, Customised Employment allows a business to examine its specific workforce needs — both ongoing and intermittent — and fulfil those needs with a well-matched employee.

Customised Employment is not a quick-fix for anyone, but a creative alternative that enables job candidates and employers the opportunity to negotiate individual job tasks and/or reassign basic job duties to improve overall productivity in the workplace. No one strategy or method works for every job seeker — and the methodology of Customised Employment is not simply for people with disabilities.

Since 2001, ODEP's demonstration projects have proven that these strategies can be successful for all applicants.

Projects nationwide have shown positive outcomes not only on behalf of people with significant disabilities but on behalf of a wide range of job candidates, typically and traditionally perceived as 'hard-to-serve', and who have various categorical labels within the workforce system: veterans with barriers to employment, transitioning youth, older workers, ex-offenders, people with limited English proficiency, and more!

Along the same lines, no one recruitment strategy works for every employer. Often job descriptions, when conceived initially, do not capture the real needs of a business. By identifying genuine (and often unmet) needs, Customised Employment has the capacity to:

- (1) Improve productivity so that incumbent staff can accomplish more of their global job duties during the work day; and
- (2) Provide a more efficient business operation by promoting productivity and retention.

***“Customised Employment works because the focus is on one person at a time . . . one business at a time.”*** Source: [www.dol.gov](http://www.dol.gov) Accessed 1/3/17.

Customised Employment: Final Implementation and Reflection Report, August 2018

## **Evidence for Practice - The Origins of Discovery.**

Lou Brown and his colleagues (1986) at the University of Wisconsin developed a narrative format known as an inventory strategy for characterising student performance and characteristics. It targeted discrepancies between student performance, their current and subsequent environments as goals for Individual Education Plans (IEP) in education. The process became known as the Ecological Inventory Strategy.

In 1986, Nesbit (a colleague of Brown) and Mike Callahan used the concept to create a Vocational Profile Strategy (VPS) at Syracuse University. Following on from this Mike Callahan and United Cerebral Palsy Associations (UCPA) conducted a series of demonstrations of the VPS. Between 1987 and 2000 a variety of Vocational Profile and Person Centred Career Planning concepts started to evolve. Victoria Commonwealth University (VCU) adopted the processes espoused by Griffin and Hammis in their Vocational Profile and Person Centred Career Planning manual (1996).

By 1998, the term 'Discovery', was adopted by Mike Callahan at Marc Gold and Associates (MGA) as an alternative to Profile Strategy. Griffin Hammis Associates (GHA) developed the term 'Discovering Personal Genius' (DPG) as the descriptor for their method of Discovery that focused on finding the evidence to support the emerging vocational themes as a guide to informational interviews which they had been conducting.

Cary Griffin from GHA stated:

*“Our particular approach to Discovery is DPG and that evolved out of what we saw didn't work with various models of Person Centred Planning...mostly what I saw was this thing we now call Voc Themes...once I had that and could articulate it a bit the process fell into place...we'd been using info interviews and tweaking those from tours to real conversations for a while and saw how engaged many employers were.... and so on with refinements that continue...”* (Lochsa Lodge, Idaho, presentation, August 27, 2017).

*“MGA has always focused more on the profile than we do...we don’t write exhaustive narratives...we look for evidence supporting the themes and let those guide us to people with the same themes...Not better, just different.”* (Lochsa Lodge, Idaho, presentation, August 27, 2017).

At its purest, Customised Employment is a unique model of engagement that focuses on bringing people together to negotiate an employment opportunity or a career path. It is not an employment agency; it is not a job search website - it is a process that focuses on abilities and collective interests of employees and employers and attempts to find an economical solution suitable to both parties.

Definition of CE: “competitive integrated employment, for an individual with a significant disability that is based on an individualised determination of the strengths, needs, and interests of the individual with a significant disability and is designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer.” (Jorgensen Smith, Dillahunt-Aspillaga, & Kenney, 2017)

### **Principles of Customised Employment**

The process of CE starts with three fundamental principles (Griffin, Hammis, & Geary, 2007)

1. *Every person is employable in an open employment environment.*

The first principle centres on the belief that society creates the barriers that exacerbate the impact of an impairment. If society is the problem, then changing the construct of the environment is society’s responsibility.

2. *Persons with disabilities, particularly complex disabilities are disadvantaged by traditional competitive employment methodology.*

The second principle comes from a critique of traditional job seeking methods. Finding a job opportunity, making a written application and waiting for a reply has traditionally provided poor outcomes for persons with disabilities. Firstly, the written application needs to be

understood for what it is, a method used by employers to exclude the majority of applicants. Secondly, the proposition of disclosure will become a greater issue of significance using a written resume and thirdly, the applicant under these circumstances, can't get to show the skills and abilities that will become the primary determinant in a positive employment outcome.

### *3. It's all about the person/s.*

The third and final principle defines the critical element of any successful position of sustainable employment – the quality of the relationship between the job seeker and the potential employer. Relationships cannot be established on paper; they can only be developed when key questions about the key individuals are answered, and the participants are encouraged to meet in circumstances that will enhance a quality conversation.

### **The Process of Customised Employment**

The underlying process of CE is known as Discovery. In the 1990s, rather than continually using comparative quantitated assessments to drive employment, the method of Discovery was proposed as an alternate qualitative technique to gather the information necessary to guide the employment pathway (Callaghan, Griffin, & Hammis, 2011).

Discovery is characterised by the following concepts:

- seeks to identify existing information rather than creating information to formulate a new evaluation or diagnosis
- creates a direction for employment possibilities based on a translation of the person's existing life experiences
- finds the ecological validity for actions and skills rather than predicting potential from a functional assessment
- reveals information which can be used as a guide for job matching, not as a method of exclusion

- encourages a 'buy-in' at all levels and empowers families, friends and community members to be part of the solution-based framework

Discovery is an in-depth, person-centred investigation of the individual's life and seeks to find key information, skills, interests and abilities that are expressed in many ways through a range of diverse environments. Trust is placed in the narratives told by people of significance, to cross-reference information which is aimed at answering two important questions:

*Who is this person and What are their ideal conditions for employment?*

Discovery's strength also resides in its desire to respect the rights of the individual by developing self-advocacy skills through the process of self-determination. The ability to self-determine through a range of personal goals, including employment has been shown to support better medium to long-term outcomes and an increased chance for independent living (Shogren, Wehmeyer, Palmer, Rifenbark, & Little, 2015). It also develops the skills of self-regulated problem solving leading to better decision making, career and job development (Dean, Burke, Shogren, & Weymeyer, 2017).

As a tool to support transition planning, Discovery has shown early promise. When compared to the more traditional methodology for transition planning, the flexibility of the qualitative person-centred approach of Discovery appears to provide some advantage (Jorgensen Smith, Dillahunt-Aspillaga, & Kenney, 2015; Molina & Demchak, 2016; Stevenson & Fowler, 2016). These, however, are small studies and more data is required with larger participation rates to validate the strength of these findings. In a larger five-year study, (Rogers, Lavin, Tran, Gantenbein, & Sharpe, 2008) used customised employment to transition 475 young people in seven school districts. At the completion of the study, 62% of these students had achieved individualised job placements at a competitive wage.

## **From Discovery to Employment Opportunity**

Although an essential and effective tool for job development, Discovery alone provides very little in securing a place of employment. For CE to be effective, Discovery must provide the direction for job developers when designing their job search strategy. It provides guidance towards employment environments that are ecologically aligned with the person's skills, interest and abilities. However, synthesis of the Discovery profile into meaningful data requires well-trained staff that have they high a high level of competency (Harvey, Szoc, Dela Rosa, Pohl, & Jenkins, 2013).

Synthesis of Discovery information is done through a thematic review of the data. Emerging themes become transparent as layers of information are reviewed. In the GHA, Discovering Personal Genius™ (DPG) methodology, three vocational themes are generated. Themes are broad categories of interest; they are not jobs or job descriptions. Themes could include animals, transport, tinkering, assembly, ordinance, care, patience etc. The challenge of the job development team is to assess the types of workplaces that would require these skills. Under the GHA methodology, each theme should generate a minimum of twenty workplace options. Thus, three emerging themes should generate approximately 60 workplace descriptions. It is these descriptions that set job development in motion. Authentic themes cannot be established without a rigorous period of Discovery (Griffin et al., 2007; Griffin, Hammis, Keeton, & Sullivan, 2014).

This methodology therefore highlights four major points: (a) person-centred data, drives job development (b) the individual is always central to any decision making (c) the job development team cannot simply use the next job vacancy as an employment option and (d) CE meets the UNCRPD charter for respecting the rights of the individual during their employment and career development.

Gathering critical information about potential employers increases the chances of a successful placement. Just as CE uses the person-centredness of Discovery to determine the interests, skills and abilities of the job seeker, CE also respects the needs of the employer by conducting a range of conversational style meetings to determine:

*Who is this Employer and What are the requirements of this business that can lead to a successful business case for employing this individual?*

One of the significant differences with CE is that it respects both parties, the employee and the employer in the negotiation process. A good relationship that is mutually beneficial to both parties is desirable for a sustainable future. To assist in attaining this outcome, techniques such as Informational Interviews are used. These conversations are designed to gather information, not to secure a job. They are extensive and provide the opportunity for the employer to tell the stories behind their business and take you on their journey and expectations for employment. Apart from sharing key information in the development of a business case for employment, this conversational interview also determines the suitability of this employer for our job seeker. Essentially this is just as much a “candidacy interview” for the employer as it is about a place of work. Informational Interviews also take away the inappropriateness of asking for a job without any understanding of the environment the job seeker will be entering (Harvey et al., 2013).

### **Is Customised Employment an evidence-based process?**

“There are no shortcuts in Customised Employment because Customised Employment is the shortcut!” (Cary Griffin, Lochsa Lodge, Idaho, presentation, August 27, 2017).

Good job development should always be embedded in good evidence-based practice (Inge, Graham, Brooks-Lane, Wehman, & Griffin, 2018). Customised Employment is based on sound, evidence-based principles and excellent training programs that provide ongoing support to service providers and also families (Harker & Desenberg-Wines, 2017). However, the evidence-base is not significant and requires more research to identify why critical parts of the process should always be followed. In 2018, Inge et al. reported the results from a survey of 28 national experts on CE. The aim of the phone survey, conducted across many states in the USA, was to elucidate critical elements of CE practice and to discuss the way future research could help add empirical evidence to the efficacy of these processes. A

thematic analysis was completed of the phone conversations which led to the creation of twelve critical elements of CE practice (Table1). These 12 elements represent good practice for CE, from Discovery through to employer engagement, development of supports, social networking, family education & planning and career development. Currently, there is a paucity of evidence elucidating how and why each of these elements are deemed essential. Our aim is to highlight these points and encourage future research to undertake the challenge of adding to the evidence-base. (Riesen, Morgan, & Griffin, 2015) had similar findings from a review of the literature in 2015. They highlighted areas such as; (a) participants and settings (b) intervention v outcome measures (c) fidelity of CE (d) social validity measures and (e) appropriate data collection including longitudinal data, as areas requiring further research.

### **The Future of Customised Employment**

Customised Employment is an established person-centred process based on good published evidence. It is also in a process that continues to evolve from the early 90's to current day practice. The opportunity exists to develop the evidence-base with further empirical research, building on a promising period of development. Just as important for Australia, the current process of Customised Employment is consistent with our legislative obligations under the UNCRPD and NDIS Act (2013). Future policy needs to be guided by a commitment to both of these critical parameters.

## Box 1. Customised Employment: Key Elements of Good Practice

1. Physically meet at a location of the individual's choice
2. Build rapport and get to know the individual
3. Mindfully listen to the person
4. Identify the individual's interests, skills and abilities
5. Conduct in-depth interviews with family and friends concerning the person's interests, skills and abilities
6. Observe the person in daily activities in a number of different community settings
7. Arrange for the job seeker to observe the local businesses that potentially match the job seeker's interests, skills and abilities
8. Conduct informational interviews with employers at local businesses that are representative of the job seekers interests, skills and abilities
9. Observe the job seeker engaging in a job-related task
10. Assist the job seeker in identifying a work experience(s) to refine /identify job interests, skills and abilities
11. Collaborate with the job seeker, family and friends in confirming the job seeker interests, skills and abilities
12. Negotiate a customised job description

### **The Process of Implementing Customised Employment in an Organisation**

Extensive experience in provider organisations nationally and internationally has illustrated that developing a true Customised Employment program is a multi-stage process. It focuses not merely on staff but engages with management, clients, family and the broader community through education, support and forums.

The process while appearing linear, is anything but due to the unique setting that each organisation exists in and the demands of clients and family.

The following steps are notionally the pathway;

- Review of organisation staff and capacity.
- Training of management and supervisors on the conditions needed to support CE.
- Training of selected staff in Customised Employment – consultant-driven processes.
- Systematic Instruction Training – integral to CE.
  - Ongoing mentoring and support of staff to engage with clients, community and employers. This is initially a weekly process and is staff

driven.

- Organisation clients and family forum.
- Value Stream Mapping to understand and eliminate any barriers to CE and staff.
- Training and support for staff and clients to undertake Self-Guided Discovery™ .
  - This involves community instruction and engages with the broader community, including schools. Mentoring is less intensive.
- Training and instruction around Group Guided Discovery.
- Train the Trainer after successful embedding of CE and CE champions identified.
  - Ongoing mentoring and support for Trainers. Mentoring as required.
- Research and evaluation – ongoing.

As mentioned, the process is not linear and adjusted according to issues and events that occur during the training and support processes. As an example, Value Stream Mapping is normally triggered in response to issues that our mentoring and support staff uncover and continues as we create a future state map of the organisation.

We know that it takes about 12 months or about 5 – 6 DPG documents before staff have their light-bulb moment and get it! It is for this reason that we support and mentor staff. Add to this the richer emotional involvement with the process and clients, and it is not hard to see why our standard practice is to support your staff with mentors that have backgrounds in mental health. Nope, no one is going down the rabbit hole; it is just that Customised Employment is a rewarding process that digs deep and encourages growth in the staff and their capacity to engage and use empathy with clients. You can imagine how rewarding it is to see clients grow, so we will shed a tear with you!

Self-Guided Discovery is an ideal tool to engage with families around NDIS planning and is effective at promoting self-determination and self-advocacy skills. Similarly, Self-Guided Discovery is a well-received tool to assist school career counsellors with transition to work planning. Group Guided Discovery is an advanced application of Discovery for higher functioning individuals who may or may not have a disability. These are advanced applications that require significant specialist training and support to undertake.

Customised Employment is an advanced skill set that puts the individual at the centre of the process and in charge of the deliverables. On average it takes about 35 hours to successfully undertake the Discovery process leading to job development, although the process can be undertaken with a range of 20 - 60 hours.

The process is client driven and is about developing relationships; relationships with clients, families, employers and the community.

### **Organisational Change.**

What happens? Well, experience tells us that organisations that adopt CE correctly find that clients and staff engage in richer purposeful conversations. Often CE staff discover that people that they are working with come to them with an increasingly richer narrative about their life, their goals and aspirations.

Organisations often adopt the DPG document as their official client record in part due to the richer detail and story that it creates around the client, their family and their community.

### **Contacts.**

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Technical Alliance Partner.



## Appendix 3: Customised Employment Video Interviews

An Interview with Cary Griffin, Founding CEO GHA

<https://www.facebook.com/disabilityemploymentresearch/videos/1164516393648679/>

An Interview with Dr Stephen Hall, Director of Policy & Research at GHA

<https://www.facebook.com/disabilityemploymentresearch/videos/1041578385942481/>

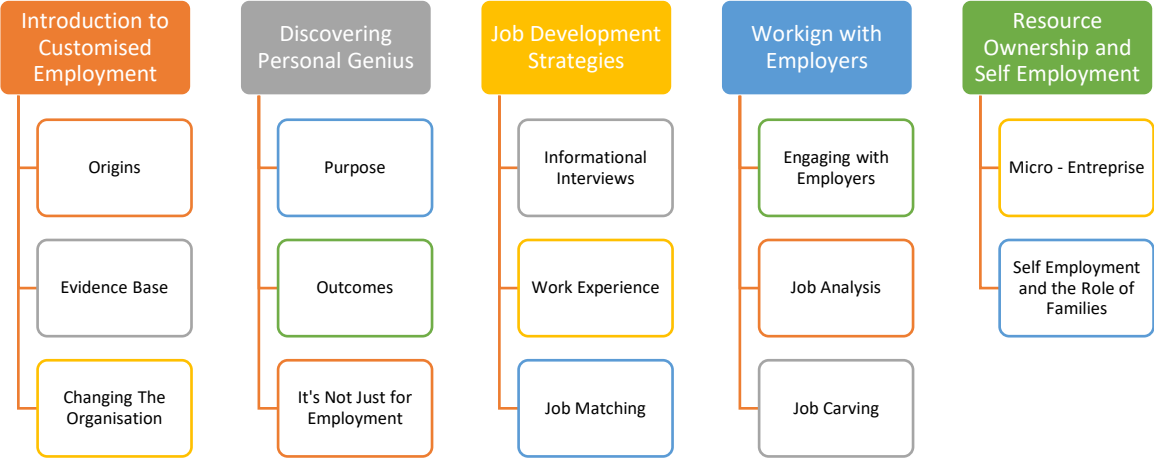
An Interview with Nick McHale, CEO Brite Services

<https://www.facebook.com/disabilityemploymentresearch/videos/1332645036835813/>



# Appendix 4: Work First™ Customised Employment Curriculum

(July 2018)



**Note:** In addition to class-based knowledge acquisition, students undertake supervised field work to consolidate and extend their learning. These activities include both engaging with the businesses to investigate the employment possibilities in a local community, and focused job placement activities with individual clients.

Module	Key Learning Outcomes	Approximate Time Allocation
<b>(1) Introduction to Customised Employment</b> <ul style="list-style-type: none"> <li>• The origins of CE</li> <li>• The evidence-base for CE</li> <li>• The organisational structures (reforms) needed to implement CE</li> </ul>		1
Purpose	This module provides the foundation knowledge necessary to understand CE and how it might be successfully implemented in an organisation. There is an opportunity for students to review and reflect on the history and evidence-base supporting CE. Students then consider how the values underpinning CE and the associated processes might be incorporated into the policies, procedures and everyday operations of their organisation.	
Outcomes	On completion of the module, students will be able to describe: <ul style="list-style-type: none"> <li>• The history of supported employment (in the USA &amp; emerging in Australia)</li> <li>• The use of person-centred planning in employment strategies</li> <li>• Current research evidence for Customised Employment, and what it can be expected to achieve for clients</li> <li>• The evolution of <i>Discovering Personal Genius</i><sup>TM</sup> as an employment tool for people with barriers to traditional competitive employment</li> </ul> Students will also be able to describe how Customised Employment could be operationalised in their organisation, and outline some initial strategies to incorporate it into the policies, procedures and everyday operations of their organisation	
<b>(2) Implementing Customised Employment through <i>Discovering Personal Genius (DPG)</i></b> <ul style="list-style-type: none"> <li>• The purpose of DPG (what it is and what it's not)</li> <li>• The outcomes that DPG is designed to achieve</li> <li>• The broader purposes and outcomes of an effective DPG process (It's not Just for Employment)</li> </ul>		(12 + 8 = 18)

Note – there are two sub-components to this module: (1) the initial <i>Discovery</i> process; and (2) the subsequent development of <i>Vocational Themes</i> as part of the DPG process		
<b>(2a) Discovery</b>		12
Purpose	This module provides the knowledge and fosters the skills needed to develop an in-depth understanding of the <i>Discovery</i> process. There is an opportunity to rehearse (with mentorship) how <i>Discovery</i> is used as a person-centred investigative tool to identify an individual’s interests, skills and abilities through a process involving the facilitation and curation of narratives articulated by the person and those who know them well.	
Outcomes	<p>On completion of the module, students will be able to:</p> <ul style="list-style-type: none"> <li>• Engage with individuals and their personal narrative</li> <li>• Engage with people who form part of the individual’s personal network, and the narratives they have to offer in relation to the person</li> <li>• Establish the role of families and friends and develop the communication strategies needed to foster engagement at the level desired by the individual undertaking the DPG</li> <li>• Demonstrate the skill of smooth listening when gathering narratives</li> <li>• Demonstrate how they can identify and use different environments in which to gather narratives (e.g., home, neighbourhoods, schools, social settings)</li> <li>• Demonstrate how they can use observations (including using aids such as video) and source additional information to complement a person’s narratives</li> <li>• Consolidate and synthesise information using the <i>Discovery</i> documentation to answer the question – ‘<i>Who is this person?</i>’</li> </ul>	
<b>(2b) Vocational Themes</b>		8
Purpose	This module provides the knowledge and fosters the skills needed to translate the understanding of the person developed through the initial <i>Discovery</i> process into information that will inform the exploration of vocational options and a ‘job search’ process. It includes the opportunity to rehearse (with mentorship) the translation of theory to practice when working with an individual to achieve these purposes.	
Outcomes	On completion of the module, students will be able to work with the person (and key people in their network), with reference to the <i>Discovery</i> process to:	

	<ul style="list-style-type: none"> <li>• Generate three <i>Vocational Themes</i> which are coherent with the interests, skills and abilities of the individual, which can provide direction for an employment search process and future job development</li> <li>• Create a <i>List of Twenty</i> job descriptions for each vocational theme, sufficient to guide the job developer to jobs which are meaningful and aligned with their interests, skills, and abilities as identified in the <i>Discovery</i> process</li> <li>• Set up <i>Informational Interviews</i> with employers to find out key pieces of information about the job descriptions that have been created</li> </ul>
<p><b>(3) Job Development Strategies</b></p> <ul style="list-style-type: none"> <li>• Conducting Informal Interviews</li> <li>• Facilitating Work Experience</li> <li>• Undertaking Job Matching</li> </ul> <p>Note – there are three sub-components to this module: (1) the use of <i>Informational Interviews</i> and <i>Work Experience</i> to explore vocational possibilities; (2) the <i>Job Matching</i> to consolidate a vocational placement; and (3) the use of <i>Systematic Instruction</i> to support the development of the skills needed to undertake and sustain a job.</p>	<p>(4+4+4=12)</p>
<p><b>(3a) Informational Interviews &amp; Work Experience</b></p>	
<p>Purpose</p>	<p>This module provides the knowledge and fosters the skills needed to bring people and employers together in a way that could lead to a business proposition that is mutually beneficial to the needs of the job seeker and the employer. It includes the opportunity to rehearse (with mentorship) the translation of theory to practice when working with an individual.</p>
<p>Outcomes</p>	<p>On completion of the module, students will be able to:</p> <ul style="list-style-type: none"> <li>• Conduct <i>Informational Interviews</i> with employers to identify the skills and attributes required by a job seeker to be actively employed by an employer in their preferred vocation</li> <li>• Identify the processes specific to individual business that make it more profitable and to which a job seeker might contribute</li> </ul>

	<ul style="list-style-type: none"> <li>• Identify problems, demands and / or bottle-necks that effect efficiency within a business and how a job seeker might minimise such disruptions, or contribute to the solutions for such problems</li> <li>• Identify a range of supports that would be necessary to enable a positive work outcome</li> <li>• Look for and identify a business proposition (work experience, work trial or work opportunity) that would be mutually beneficial to the job seeker and the employer</li> <li>• Introduce the job seeker to an employer of interest to discuss the working skills required and any common points of interest</li> </ul>	
<b>(3b) Job Matching Strategies</b>		4
Purpose	This module provides the knowledge and fosters the skills needed to establish a plan for work that can support the job seeker and the employer in the workplace.	
Outcomes	<p>On completion of the module, students will be able to:</p> <ul style="list-style-type: none"> <li>• Establish the ideal conditions for a job placement</li> <li>• Negotiate a job description which is suitable for the employee and the employer</li> <li>• Discuss a payment structure that is suitable for the task and the relevant industrial award</li> <li>• Discuss the need for informal supports which may be required to assist in training of both job/task specific skills and soft skills needed in the workplace</li> <li>• Discuss any assistance required to develop formal supports in the workplace</li> <li>• Discuss the process of fading informal supports as appropriate</li> </ul> <p>Discuss the review process and any ongoing supports that may be required.</p>	
<b>(3c) Systematic Instruction</b>		4
Purpose	This module provides the knowledge and fosters the skills needed to teach on-site the specific skills a person needs to undertake their job; by breaking down workplace tasks into simple reproducible steps enabling repetitive learning to occur.	
Outcomes	<p>On completion of the module, students will be able to:</p> <ul style="list-style-type: none"> <li>• Breakdown a workplace task into simplified steps</li> </ul>	

	<ul style="list-style-type: none"> <li>• Select an appropriate teaching strategy to provide suitable prompts and naturally occurring rewards for learning</li> <li>• Evaluate the teaching method and ensure reproducible results</li> <li>• Refine the process to maximise efficiency of learning and foster generalisation of skills</li> </ul>	
<b>(4) Working with Employers</b> <ul style="list-style-type: none"> <li>• Engaging with Employers</li> <li>• Job Analysis</li> <li>• Job Carving</li> </ul>		6
Purpose	This module provides the knowledge and fosters the skills needed to establish relationships with employers at a generic level. That is to foster opportunities without necessarily having a specific person in mind for placement. These opportunities can provide work trials and experience that can complement the DPG process, without necessarily having an employment outcome.	
Outcomes	On completion of the module, students will be able to: <ul style="list-style-type: none"> <li>• Identify potential employers in a local area</li> <li>• Cold canvass for interest in providing information about work trial opportunities</li> <li>• Operationally describe specific tasks in a work place</li> <li>• Work with employers to ‘carve-out’ new jobs from existing jobs</li> <li>• Develop position descriptions for these new jobs</li> <li>• Identify the conditions and supports needed for a new employee to join the team</li> </ul>	
<b>(5) Resource Ownership &amp; Self Employment</b> <ul style="list-style-type: none"> <li>• Microenterprise</li> </ul>		1

<ul style="list-style-type: none"> <li>• The role of families in self-employment</li> </ul>		
Purpose	<p>This module provides the introductory-level knowledge needed to support an individual to pursue self-employment, as an alternative to a conventional situation of employment with an employer. It will introduce the concept of a microenterprise and present the considerations needed to engage the support of the person’s family and broader network to support the pursuit of self-employment.</p>	
Outcomes	<p>On completion of the module, students will be able to:</p> <ul style="list-style-type: none"> <li>• Explain the concept of a Micro-Enterprise</li> <li>• Discuss the considerations needed when considering a small-business option</li> <li>• Outline the basic resources needed to pursue a small business enterprise resources and identify from where such resources might be sourced</li> <li>• Explain the role of education / training and how volunteer supports might be used to enhance a person’s capacity to pursue a self-employment option</li> </ul>	
<b>TOTAL</b>		<b>40 Hours</b>



## Appendix 5: The Discovery Fidelity Scale

NOTE – An Australian version of this scale is currently in development

### **INTRODUCTION**

The promise of the Discovery Fidelity Scale is successful employment for the employment seeker if practitioners implement the components of Discovery with the tenets described in the scale with acceptable accuracy.

Adequate Authorisations, Access, Financing, and Provider Quality are required Discovery Systems components. Home and Area Visits, Discovery Activities, Informational Interviews with businesses, a Vocational Profile Review, and an Employment Plan are required DiscoverServices components. The Discovery Fidelity Scale is divided into two sections.

The first section is **Discovery Systems Fidelity** and the second section is **Discovery Services Fidelity**.

#### ***Discovery Systems Fidelity***

1. Authorisation and Access
2. Financing
3. Discovery Providers

#### ***Discovery Services Fidelity***

1. Home and Area Visits
2. Discovery Activities
3. Informational Interviews
4. Vocational Profile Narrative Review
5. Employment Plan

### How the Discovery Fidelity Scale works:

- The eight components of Discovery Fidelity just mentioned above have tenets (underlined) for each particular component. Each tenet is scored by determining which of four unique scalable fidelity definitions under the tenet best matches current implementation of that tenet. Choose only one of the four fidelity descriptions for each tenet: Unacceptable, Acceptable, Good, and Exemplary should be chosen for each tenet.
- When in doubt among the four scalable selections, the selection that has the lowest score should be checked. The Fidelity descriptions are:
  - Unacceptable (Score -1)
  - Acceptable (Score +1)
  - Good (Score +2)
  - Exemplary (Score +3)
- All Scores are totaled at the end of the Scale.
- The following describes how reviewers make scoring selections:

When scoring -1 Unacceptable, choose the best description of circumstances when compared to the other three choices;

When scoring +1 Acceptable, choose the best description of circumstances when compared to the other three choices;

When scoring +2 Good, the choice assumes the best description of circumstances is +1 Acceptable and +2 Good

**together**; Good +2 should not be selected unless +1 Acceptable is also true, and;

When scoring +3 Exemplary, the choice assumes the best description of circumstances is +1 Acceptable, +2 Good, and

+3 Exemplary descriptions **together**. Exemplary should not be selected unless +1 Acceptable and +2 Good are also true.

### ***EXAMPLE OF THE ORIGINAL DISCOVERY SERVICES FIDELITY SCALE***

#### **Home and Neighborhood Visits**

The Employment Specialist meets with the employment seeker (two to four hours) at his or her home if possible.

Attendees should include family, friends and invited others.

The purpose of the meeting is to learn:

- (a) what is important to the employment seeker,
- (b) about financial requirements and government benefits,
- (c) interests,
- (d) daily routines, chores, activities the employment seeker participates,
- (e) the skills used by the employment seeker,
- (f) the community places the employment seeker goes, and
- (g) transportation options.

A conversation takes place to learn what is important to the employment seeker and to learn new information about the employment seeker, without evaluating. If given permission and appropriate, the Employment Specialist should see the employment seeker's bedroom, other personal spaces, belongings, possessions, and what's displayed.

Through neighborhood and area visits the Employment Specialist becomes familiar with area businesses, available transportation, and the employment seeker's personal connections, relationships, and use of community places. The neighborhood and area visits may be completed before the home visit, in conjunction with, or after the home visit. Area and neighborhood visits will customarily take two-four hours.

Discovery Services Tenet	Scoring				Fidelity Score
	Unacceptable - 1	Acceptable + 1	Good +2	Exemplary +3	
2(a) Begins Discovery with an interview in the employment seeker's home.	A home visit or a visit to a mutually acceptable place in the community did not occur, or professionals were the primary invitees to the meeting. The Discovery Staging Record or Vocational Profile documents services, programs, vocational goals, job interests, employment history, etc. <i>Example: The meeting occurred in a day center, sheltered workshop, group home, the employment provider's offices, or was a brief meeting with the employment seeker and family. The discussion was limited to the employment seeker's time spent in disability services programs, past jobs, employment interests, etc.</i>	The Discovery Staging Record or the Vocational Profile describes a meeting in the employment seeker's home with his or her family. Unique information about the employment seeker's daily life is learned during the home visit. <i>Example: The report documents the meeting, including information from family and friends. The Discovery Staging Record or the Vocational Profile documented that during the home visit the Employment Specialist received a good understanding of who the employment seeker is and the report describes information that is unique to this person.</i>	The Discovery Staging Record or the Vocational Profile includes information about the employment seeker's personal connections and those of his or her family and friends, including how often and how much time the employment seeker spends with each person and what they are doing when together. <i>Example: The many personal connections or "social capital" of the employment seeker and his or her family and friends, are evident, including his or her connections with other community members and businesses.</i>	The Discovery Staging Record or the Vocational Profile contains information unique to the employment seeker obtained during the interview, including direct quotes from the employment seeker, family, and friends. <i>Example: The report documents unexpected information learned about the employment seeker, his or her current life, activities, interests, relationships, community engagement, and the skills he or she uses in daily life, not just employment-related information.</i>	



**Interview Guide #1 – Disability Support Professionals (Job Coaches)**

1. How long have you been working in the disability sector?
2. How long have you been supporting people with disability to find work?
3. Had you had any previous training to support you to find work for people with disability; and if so tell me about that training?
4. Tell me about your experience of training in *Discovery*: the workshop sessions; the mentorship program? What was helpful and what could have been improved?
5. Tell me about your experience implementing *Discovery* with your clients: the highlights and the challenges; what worked and what could have been improved?
6. Tell me about your clients' experiences of *Discovery*: the highlights and the challenges; what worked and what could have been improved?
7. Do you have any comments or suggestions to make concerning *Discovery*, and the implementation of *Customised Employment* more broadly?



## Interview Guide #2 – Person with Disability (& their Family)

1. Tell me about the work you are doing?
2. Tell me about the people at your work place?
3. Tell me what you are learning or achieving at work?
4. Are there any good things about your work that you can tell me?
5. Is there anything that could be better at your work?
6. Do you get enough support at work; is there any other support you would like?
7. Do you think you will stay in this work; tell me about your future at work?
8. Thinking back to the beginning, how did you get the work?
9. How did your job-coach [Name] help you get the work?
10. How did your job-coach [Name] help you after you got the work?
11. Think about all the meetings and planning that you did, and your *Discovery Plan* (show plan). Can you please tell me a little about your plan?
12. Tell me about the planning meetings; what you liked or didn't like; any challenges?
13. How were you involved in the meetings; who else was involved?
14. What choices / decisions did you make?
15. What were the best things about the meetings?
16. What could have made the meetings better?
17. Do you have anything else to say about *Discovery*; about the support you have received to look for and get your job?



### Interview Guide #3 – Employer of person with disability

1. For how long have you employed [Name of person with disability]?
2. What did you employ them to do?
3. Why did you employ them?
4. What were your expectations at the outset?
5. What have they achieved in your work place?
6. What if any *reasonable adjustments* did you need to make?
7. What has made their employment with you possible?
8. What if anything has hindered or endangered their employment?
9. What do you see their future to be with your business?
10. What supports, if any, might you need going forward to sustain their employment?
11. Do you have any comments or suggestions to make concerning the *Customised Employment* program?

