

CUSTOMIZED EMPLOYMENT

Applying
Practical
Solutions for
Employment
Success

Volume 2



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The Office of Disability Employment Policy (ODEP) within the U.S. Department of Labor is committed to improving employment outcomes for individuals with disabilities. To achieve this goal, ODEP established a Customized Employment initiative to build the capacity of workforce systems to serve all customers, including individuals with disabilities. The strategies developed through this initiative can assist all workforce customers who have complex needs and may require more individual assistance to achieve their employment goals. The Customized Employment initiative also focuses on using universal strategies that can be used to serve any customers with barriers to employment, not just individuals with disabilities.

Customized Employment: Applying Practical Solutions for Employment Success is the second in a series of Customized Employment portfolios. The first portfolio, *Customized Employment: Practical Solutions for Employment Success*, provides a general overview of the following topics:

- Customized Employment: A New Competitive Edge
- Principles and Indicators
- Job Seeker Exploration
- Creating a Blueprint for Job Development
- Negotiating with Employers

This second piece expands on those topics and provides ideas on how to use these strategies with job seekers for their own Customized Employment success.

Copies of the Customized Employment portfolios can be ordered from the Office of Disability Employment Policy at 866.633.7365 or read online at www.onestops.info.



Customized Employment: An Overview

The Customized Employment process is a flexible blend of strategies, services, and supports designed to increase employment options for job seekers with complex needs through voluntary negotiation of the employment relationship with an employer. The job seeker is the primary source of information and drives the process. The Customized Employment process begins with an exploration phase, which lays the foundation for employment planning. Planning results in a blueprint for the job search where an employment relationship is negotiated to meet the needs of both the job seeker and the employer.

Job Seeker Exploration

Time spent engaging with the job seeker to explore their unique needs, abilities, and interests, as well as their complexities, is essential to establishing successful employment. Unlike traditional testing or standardized assessment, Customized Employment engages the job seeker in controlling the exploration process, and captures their preferences and connections in the community. The job seeker selects friends, family, and colleagues to participate in the exploration phase so that they can share positive perspectives and potential connections to employment opportunities. At the conclusion of the exploration phase, the job seeker makes decisions about their employment goals and potential employers to approach.

Customized Planning

Information gathered from the exploration process is the foundation for Customized Employment planning. The Customized Employment planning process should result in a blueprint for the job search. There are also numerous tools—including profiles and portfolios—that can be used to capture, organize, and represent the information that is collected during exploration and planning.

Employer Negotiations

An essential element in Customized Employment is negotiating job duties and employee expectations to align the skills and interests of a job seeker to the needs of an employer. This negotiation results in a job description that outlines a customized relationship between employer and employee. Options for customizing a job description include job carving, negotiating a new job description, job creation, and job sharing. Other points of potential negotiation include job supports, the hours or location of the job, or specifics of supervision.

Job Seeker Exploration: Laying the Groundwork for Customized Employment

Introduction

Suitable employment for job seekers with complex lives rarely comes from newspaper want ads, job postings, online career ads, or signs in shop windows. Customizing the relationship between employers and job seekers can offer an effective alternative. Employment professionals need to get beyond comparative, competitive evaluation strategies and embrace a more person-focused strategy—job seeker exploration using a discovery approach.

What Do We Mean by Exploration?

Exploration is a strategy that asks employment professionals and job seekers to discover all the facets of the individual's life that relate to employment. It is only from this in-depth exploration that we can truly customize an employment relationship.

Exploration can be accomplished in a number of ways, depending on the needs and preferences of the job seeker. Many job seekers will wish to engage in a process of **self-exploration**, often facilitated by others. This involves answering questions, reflecting on ideas and past experiences, and identifying personal issues and challenges. Other job seekers may wish to participate in a peer group such as a job club in which members assist each other in **shared exploration**. Still other job seekers, especially those with significant complexities, will benefit from **facilitated exploration**, a process in which an employment professional, family member, or friend spends the time necessary to understand the job seeker's strengths, needs, and preferences.

This article will focus primarily on facilitated exploration. It is written for the employment professional who may have the opportunity to act as a facilitator in the exploration process.

Why Is the Exploration Phase So Important?

Exploration is a critical first step in the Customized Employment process. Once planning identifies the job seeker's strengths, needs, and interests, a plan can be developed describing how those skills can best be utilized. Unless we first discover information about the job seeker's life, we often develop goals **for** the job seeker rather than goals **by** the job seeker. Exploratory time is necessary to understand the job seeker's lifestyle, personal goals, preferences, experiences, and needs. It is also critical to identify the complexities that the job seeker brings to potential employment relationships. Formal testing and vocational evaluation procedures may be used to supplement this exploration when specific additional information is needed to complete the picture.

Note of Advice Regarding Consent, Confidentiality, and Pre-Employment Inquiries

The process of exploration involves working with an individual to understand his or her strengths and interests. The job seeker must drive the process and identify whom they want to participate. It is critical that facilitators working with a job seeker have the job seeker's permission to speak with the range of individuals who might be part of the exploration process. In addition, prior to exploration there should be an explicit discussion with the job seeker explaining that this exploration process may involve inquiries into whether and to what extent the job seeker has a disability. It is vital that the job seeker be informed that the information requested is intended for use solely in connection with the voluntary affirmative action efforts of the Customized Employment process.

The job seeker must be informed that (1) the specific information is being requested on a voluntary basis; (2) the information will be kept confidential in accordance with applicable law; (3) the refusal to provide such information will not have an adverse effect on the provision of employment services; and (4) the information requested will be used only in accordance with applicable law, including the Americans with Disabilities Act and the Workforce Investment Act.

Facilitating Exploration: Ingredients for Success

A positive attitude sets the pace for all exploration activities. It is essential to maintain the focus on the job seeker’s interests, strengths, and needs to determine the conditions under which the job seeker will “shine” as an employee. If you are the exploration facilitator, you need to:

- Believe that the job seeker can work
- Model confidence in the job seeker for the group
- Use an array of strategies to understand the job seeker’s life story and the conditions for success
- Emphasize the job seeker’s contributions and interests

In addition, when discussing disability, staff should focus on the individual’s abilities and the accommodations and auxiliary aids and services that may be needed in order to use these abilities, rather than on limitations.

Skills Necessary for Facilitated Exploration

The facilitator must use the following skills in this exploration phase in order to achieve success.

Sharing

There is a great deal to be learned about the job seeker if all parties begin by sharing their picture of the job seeker from different—yet optimistic—perspectives that relate to work.

Listening

Listening carefully to all parties in the exploration process creates a clearer understanding for everyone. However, employment professionals must also be observant and pay attention beyond the original answers and surface meaning. Go beyond simple questions and answers as your primary strategy for gaining insight.

Reflecting

All parties involved in the exploration process must reflect on their thoughts, memories, and aspirations for the job seeker. The time spent in reflection with the job seeker, family, and others allows everyone to see personal information from an employment perspective while sorting out the complexities in the job seeker’s life.

Note of Advice Regarding Disclosure of a Job Seeker’s Disability

Inquiring about disabilities may be useful in assisting an individual to move into employment. However, service providers need to be aware of the rules governing pre-employment inquiries into whether and to what extent an individual has a disability. See “Note of Advice Regarding Consent, Confidentiality, and Pre-Employment Inquiries” on p. 2 about when and how to share this information. Generally speaking, service providers may not disclose to others disability-related information about the job seeker. Remember that information concerning a disability needs to be kept confidential unless the individual gives explicit consent. (For additional information, see “Appendix A—Description of rules relating to disability-related information” in *Strategies and Practices for Effectively Serving All One-Stop Customers—A Framework for Systems Change* and the U.S. Department of Labor Civil Rights Center at www.dol.gov/oasam/programs/crc/.)

Describing

Describing the job seeker should be done in a positive, comprehensive, robust, and non-evaluative manner, whether verbally or in written form. This is important because it:

- Redirects others from jumping to conclusions before all the information has been gathered about the job seeker
- Enables others to clearly visualize the job seeker in a work environment
- Stimulates further conversation that leads to additional questions and information to help complete the picture of the job seeker

Give and take

Discussion and compromise are necessary in the exploration process to ensure that everyone achieves a win/win outcome. The facilitator will need to negotiate with the job seeker and other participants on an array of topics, from setting times to meet to seeking clarity on the details of the desired type of employment.

Techniques for Discovering Information

There are several ways that facilitators can explore the job seeker’s employment-related goals and interests to uncover pertinent information.

Observation

Good observation skills are vital to effective exploration. A skilled observer will note the time the job seeker takes to move from one area to another and their interactions with both familiar people and strangers. The facilitator will also find the chance to observe the job seeker as he or she makes decisions to respond to different cues. The employment professional should observe the job seeker in different situations and a range of environments. It is also important to observe routines that can give a picture of how full or empty the job seeker’s day is, and whether or not accommodations are needed.

Conversation

Another exploration tool is conversations with the job seeker and family, friends, teachers, and support people selected by the job seeker to be part of this process. Conversations should be free-flowing but use a subtle structure to keep the process on track. It is important to consider words chosen, body language, and tone.

Describing Sue’s Activity

Sue creates needlepoint items to be framed for her family. Most of the items are family names that she puts together by counting the number of holes for each letter to create a template. She takes care to use the colors in the recipient’s home, and makes one item a week. While she usually uses material that has ten stitches to an inch, she prefers 22 holes to an inch, which is very small and detailed work. Her work is precise, with each stitch being even and going in the same direction. She has been offered money for these creations from others outside the family. She typically works alone, late at night. Her mother purchases the materials to reduce Sue’s frustration when making choices.

This description is useful in exploration because:

- It creates a positive picture of the job seeker.
- It provides details. Instead of saying “Sue loves to work with her hands,” it gives a description of how she uses her hands, including the activity itself, the pace, supports offered, performance, and her interest in the activity.
- It makes it easier to envision the characteristics of a working environment in which Sue can perform successfully (e.g., sitting for long periods, working alone, and performing detailed tasks that might involve counting).

Interviewing

While job seekers, family, and friends are likely to be comfortable with a conversational style, more structured conversations with service providers, counselors, and other professionals may help to provide information in a manner more consistent with their experience. Interviewing may also be effective with job seekers and non-professionals when seeking perspective on more routine parts of a person's day that may lend themselves to shorter responses.

The “Where” of Exploration: Consider a Range of Places

Home

Home is where most job seekers are most “who they are.” Going to a job seeker's home, if invited, establishes trust that the process is primarily about them—not the agency, the system, or the labor market. The job seeker's home is a place to understand the complexity of that person's life. Home is also where, for most people, life intricacies are worked out, such as preparing meals, enjoying hobbies, sharing rides, and the basic organization of day-to-day activities. Such visits help the employment professional understand the number of people living there, their intensity in the job seeker's life, and possible contributions they may offer the job seeker when developing employment options.

Familiar community places

Since most jobs are performed in the community, it is necessary to go into the community with the job seeker. Visiting a place that is part of the job seeker's daily routine can give information on responses to that setting, such as the job seeker's skills, pace, dress, acquaintances, and social interactions. Job seekers can help identify these places when sharing their daily routines with the facilitator.

New places in the community

When the employment professional observes the job seeker engaging in novel activities, it is important to learn how the job seeker identifies where to go, responds to the natural cues in a new environment, and meets strangers. This information will be critical as you recognize strengths or needs for the work environment, and consider strategies to support the job seeker in the new job.

A Note of Advice

Not spending enough time on these activities could result in a less comprehensive picture of the job seeker and potentially create the danger of overlooking some complexities that may impact employment. Also, remember that the exploration process is meant to uncover information regarding the job seeker's strengths and interest, not to test or assess the job seeker.

The “Who” of Exploration: Identifying a Range of People

Job seeker and immediate family

Information should be gathered initially from the job seeker and then from trusted family and friends, as appropriate, who are willing to participate in developing employment for the job seeker. They can provide insight about the job seeker’s distinct characteristics.

Community connections

This group may consist of extended family, neighbors, church members, or other connections in the community. These individuals can have insight into the job seeker’s unique abilities and interests. They may also be resources to “open doors” when contacting targeted employers.

Personal representatives

Job seekers often use a personal representative to assist and potentially represent them to an employer. This can be a counselor, job developer, advocate, employment professional, or other qualified person. The personal representative may or may not be the facilitator of the exploration phase of the Customized Employment process. If the personal representative is not the facilitator, in order to understand the job seeker’s background and negotiate effectively with employers, the representative should be involved in the exploration process.

Service providers, counselors, teachers, and other professionals

Professionals who care about the job seeker can offer an important perspective. Try to ensure that the professional either has or had direct contact with the job seeker. In addition to those professionals who have regular, direct contact with the job seeker, there is often an array of people in other staff and service roles who might be able to offer insight and information.

Making Time for Exploration

Many people say they don’t have time for such an in-depth exploration. However, without adequate time for exploration a job seeker is likely to remain either chronically unemployed or chronically changing jobs. Different methods and services are required to reach a different outcome. More time spent on exploration will pay off in less time spent on the job search, successful outcomes, and longer retention.

Customized Employment entails the voluntary negotiation of an individually tailored relationship between a job seeker and an employer. Job seekers with more complex life situations have typically had assistance in customizing relationships with employers. Using an intermediary to negotiate the deal with employers can be helpful. This person is often referred to as a **personal representative**. However, many job seekers wish to represent themselves. This brief addresses issues and provides suggestions for anyone who is working with a job seeker who wants to self-represent when negotiating a customized relationship with an employer.

To Self-Represent or Not

When customizing an employment relationship, all parties should carefully consider whether a job seeker should self-represent or have a personal representative negotiate on his or her behalf. Employers are used to having job seekers go through the typical procedures of application, resume submission, and interviewing. If job seekers approach an employer in an attempt to customize, they are likely to be caught up in those traditional procedures. Employment professionals can consider the following when helping job seekers make the decision whether or not to self-represent.

Advantages of self-representation:

- Job seekers "own" the process. They make decisions about ways to focus on competencies, minimize weaknesses, and disclose information.
- Job seekers control the degree of effort to expend in making employer contacts.
- Job seekers have firsthand knowledge of their fit with a potential workplace.

Advantages of using a personal representative:

- Personal representatives are often more experienced and skilled in making presentations to employers.
- Job seekers can share the responsibility and have the expectation that someone else will make contact with employers.
- Some individuals may feel more comfortable if someone who is not personally involved addresses disclosure of a disability.

Those Who Self-Represent Should Follow the Same Customized Employment Process

If the job seeker plans to self-represent, he or she should follow the same customized planning process recommended for those choosing a personal representative. Employment professionals can still have a supporting role. Employment professionals can:

- Explain the importance of the exploration phase
- Support the job seeker to create a customized plan
- Help develop representational materials
- Prepare the job seeker for presentations
- Offer partnering or backup support
- Encourage the use of personal connections to find employers
- Guide the job seeker through the actual negotiation process from behind the scenes

Each of these areas is discussed further below.

1. Conduct exploration

The process starts with an in-depth self-exploration by the job seeker. If job seekers choose to self-represent, they still need to personally identify their hobbies, passions, and interests. Employment professionals can help the job seeker consider potential business locations, personal connections, and educational and work experiences. The professional can support the job seeker to involve family, friends, and other trusted professionals when identifying connections that may lead to employment. See “Job Seeker Exploration: Laying the Groundwork for Customized Employment” for additional information on the exploration phase.

2. Create a Customized Employment plan

The exploration phase provides a foundation for the Customized Employment plan. Even if the job seeker is self-representing, an employment professional can facilitate plan development. The job seeker directs the plan, decides whom to involve, and maintains the focus on his or her vision and career goals. Just as if the job seeker chose a personal representative, the customized planning process should culminate in a document that serves as a blueprint for the job search.

3. Develop representational materials

Representational materials are important, as they can provide structure in the negotiation process. These materials can take the form of a resume, brochure, or pictorial portfolio. Whatever form is chosen, these materials should provide information about the job seeker, highlight his or her job attributes, and support the need to customize an employment relationship. The portfolio can guide the job seeker through the presentation to prospective employers; it can also offer a personal touch necessary to establish a connection. Employment professionals can support job seekers in collecting and organizing their representative materials as they prepare for presentations.

4. Prepare for presentations

Unlike personal representatives, job seekers will likely be making a customized presentation for the first time, creating the need to practice. Employment professionals can consider the following steps to help job seekers prepare:

- Encourage job seekers to become informed about the concept of Customized Employment by reviewing brochures, websites, and documents such as this portfolio.
- Assist job seekers to develop an outline or script for the presentation.
- Practice, practice, practice. Encourage job seekers to role-play their presentation with trusted people in a comfortable location.
- Decide the extent and means of disclosure. Disclosing one’s disability or life complexities is voluntary; however, it can be helpful in customizing an employment relationship. The employment professional can act as a sounding board when deciding how and whether disclosure should be handled during negotiations.
- Prepare for the unexpected. Discuss the range of potential questions that the job seeker might face during employer presentations.

5. Offer partnering and backup support

When a job seeker decides to self-represent, customized negotiations should still be a shared effort. Having an employment professional offer partnering support can diminish the stress of shouldering the entire responsibility. Job seekers should be encouraged to take the lead and direct the process, but have access to professional backup as necessary.

6. Use connections

Personal connections should be the primary resource for identifying potential employers. Employment professionals can highlight the importance of asking the job seeker's friends, family, and other personal connections for ideas, contacts, and referrals to potential employers.

7. Negotiate with employers

The final aspect of the customized process involves negotiating with employers. It is best to approach an employer with the intent to offer a business proposal. The proposal highlights the job seeker's customized contributions, based on their plan, in exchange for the employer's willingness to negotiate a tailored job description. The following guidelines can be offered to enhance the presentation by the job seeker:

- Start with a presentation of the concept of Customized Employment. Don't wait for the employer to ask about it. The job seeker should be prepared to take the lead.
- Explain the intent to customize, and why customization is needed. This may potentially involve voluntary disclosure of personal disability and other relevant, sensitive information to the employer.
- Be as brief as possible in the initial meeting (no more than about thirty minutes).
- Allow time for a few meetings with the employer, and perhaps arrange for a tour of the business. Do not rush the employer for an answer during the initial presentation.
- Focus on identifying discrete, unmet needs of the workplace rather than filling a particular job slot. Match those discrete employer needs with the qualifications and interests of the job seeker.
- Emphasize the benefit to the employer. If the employer can clearly see how hiring the job seeker in question will alleviate challenges, increase productivity, or generate revenues, they will be more likely to engage in a negotiation for Customized Employment.

Making Sure the Job Seeker Is Ready

When a job seeker is considering self-representation, the following questions should be explored to ensure that the job seeker is prepared. If the job seeker feels uncomfortable with his or her capacity in any of these areas, even with partnering and support, a personal representative may be the best route to ensure success.

- Is the job seeker confident in his or her ability to communicate verbally with an employer?
- Does the job seeker have a plan to avoid the typical application procedures of the business?
- Has the job seeker considered how they will explain the concept of Customized Employment and the need for customization?
- Has the job seeker targeted a potential set of tasks to be performed for the employer and a specific set of conditions that must be negotiated?
- If the job seeker has had experiences that might be considered negatively by the employer (spotty work history, firings, legal entanglements, etc.), have they considered how to explain these in the best possible light?
- Has the job seeker developed materials, with support as necessary, that can be used to help explain Customized Employment and highlight contributions to the business?
- Has the job seeker practiced making a presentation with someone who can give constructive feedback?

Negotiating with Employers for Customized Employment Opportunities

The aim of Customized Employment is to align the job seeker's profile to a collection of job tasks that help an employer meet a specific need. Therefore, successful Customized Employment opportunities are developed by appealing directly to the employer's circumstances and needs, rather than trying to sell an employer on the general notion of hiring people with barriers to employment. In fact, negotiations with employers can only begin, and will only be successful, when everyone involved in the negotiation sees the **benefit to the employer**.

Typically, an employer will be willing to consider customizing job tasks for a prospective employee if this act:

- Saves money
- Helps make money
- Helps the operation run more efficiently
- Improves customer relations
- Increases safety

Thus, effective negotiation with employers rests on having an understanding of an employer's workplace. This requires examining necessary tasks of the business and developing a plan that proposes increased efficiency and other benefits to the business via customizing job assignments to match the job seeker's skills, interests, and need for accommodation and support.

A quick reminder before we start...

There are two necessary initial steps in the customized job search process:

- Complete an exploration process that outlines the job seeker's interests, skills, preferences, preferred working environments, needed supports, and accommodations. (See "Job Seeker Exploration: Laying the Groundwork for Customized Employment" for more detail.)
- Create a job search plan that is based on the results of the exploration process and driven by the kinds of tasks the job seeker might perform in a customized job.

Practical Steps for Employer Negotiation

Once potential employers have been identified through exploration, there are four practical steps for negotiating with employers for Customized Employment:

1. **Become acquainted with work site needs**
2. **Identify tasks that can be customized for the job seeker**
3. **Negotiate an employment proposal**
4. **Ensure post-hire success for the job seeker and employer**

1. Become Acquainted with Work Site Needs

The employment professional can become acquainted with work site needs by conducting informational interviews, asking for a tour of the business, and showing an interest in meeting the employer's needs.

Conduct an informational interview

One of the best ways to begin to understand the employer's needs is to conduct an informational interview—that is, to ask the employer key questions that will lead to more knowledge of the business and its operations. Employers are generally quite willing to meet when there is a sincere desire to learn about the business. The purpose of the informational interview is not selling the employer on Customized Employment; it is simply a prelude to potential negotiations that may occur after more is learned about the business. The employment specialist should come to the meeting armed with a few straightforward questions.

Ask for a tour

Another method for understanding workplace needs is to tour the work site. A tour is a good way to clarify operational procedures, identify specific tasks, and pinpoint opportunities where customizing a position would benefit that employer. It is often necessary to visit the business more than once to learn about operations and identify potential tasks that could be customized.

During the tour, identify possible challenges or areas of operation that are particularly troublesome for the work site. Things to consider:

- Rush times
- Tasks performed on a sporadic basis
- Bottlenecks/logjams/overflowing inboxes
- Inefficient use of key staff
- Activities that pull staff away from critical (e.g., moneymaking) responsibilities

Through these observations and discussions during the informational interview and tour, the employment professional can begin to think about **specific tasks** that match a job seeker's interests or capabilities.

Show an interest

As you are becoming acquainted with work site needs, one of the most important things to convey to an employer is your interest in helping the operation run more efficiently. The primary objective of these initial meetings is to find out how an employer operates. Illustrating how Customized Employment could benefit an employer through creating task lists and negotiating the employment proposal are the next steps.

Questions to Consider Asking on an Informational Interview

- What is your business most proud of? (It never hurts to give the employer a chance to brag about what they do.)
- How are you different from [name of competitor]?
- Are there specific hiring procedures?
- How does work get done?
- Are there challenges to getting work done?
- Is there a particular area where you need more help?
- Can you show me how to do [task]?

2. Create a Task List

Once the workplace is understood, a task list can be an effective tool to present the idea of Customized Employment and begin the negotiation process with an employer for a particular job seeker. Task lists present potential tasks that might be reassigned, established, or restructured for the job seeker. The task list leads to a customized job description that will be part of a negotiation.

Tasks lists may be extensive or brief, depending on the business and job seeker. There may be different tasks from different departments. These task lists become a “menu” from which responsibilities for customized jobs might be chosen during the negotiation. Sample task lists created from visits to three companies who later hired job seekers for customized assignments are given on the right.

Characteristics of an Effective Task List

A good task list:

- Is based on the employer’s needs and job seeker’s skills
- Should be specific, avoiding general and vague terms like “filing,” “photocopying,” and “cleaning”
- Presents the tasks in the order of their importance to the employer
- May include tasks across a number of different jobs and departments to demonstrate the flexibility of customizing a position
- Highlights benefits to the employer

Sample Task Lists

Book Distributor

| Department | Potential Tasks |
|------------------------|--|
| Human Resources | <ul style="list-style-type: none"> • Collate new hire packets • Distribute paychecks • File personnel information • Shred old files |
| Marketing | <ul style="list-style-type: none"> • Tear the covers off unsold paperbacks and magazines to return to publisher for rebates • Attach security covers on music CDs and movie DVDs • Collate press kits • Fax press releases |
| Administration | <ul style="list-style-type: none"> • Log and photocopy accounts received • Mail billing statements • Restock printers and photocopiers • Meter outgoing mail • Clean conference rooms and kitchens |

Retail Clothing Store

| Department | Potential Tasks |
|--------------------|---|
| Stockroom | <ul style="list-style-type: none"> • Attach security devices • Hang clothes • Price stock • Size stock • Steam clothes |
| Sales Floor | <ul style="list-style-type: none"> • Mark down clearance items • Straighten and size racks and tables • Return stock from fitting rooms to racks • Clean mirrors, displays, and windows • Vacuum the sales floor |

Dentist Office

| Potential Tasks |
|---|
| • File patient charts using color-coded and numerical systems |
| • Run routing slips and pulling patient charts |
| • Take deposits to the bank |
| • Stamp envelopes and patient reminder postcards |
| • Take mail to the post office |
| • Escort patients to treatment areas |
| • Distribute mail to office staff |

In each of the examples, the lists reflect specific tasks as they are performed in a specific workplace. That is, instead of simply listing “collating,” the list refers to “collating new hire packets,” or “collating press kits.” From each of these examples, jobs were eventually customized for job seekers based on assigning them selected tasks from the lists (not necessarily all of the tasks). And in each case the employer benefited from reassigning the tasks, as will be shown in the example in the next section.

3. Negotiate the Employment Proposal

After the task list is complete, it is time to start thinking about negotiation. **Remember that negotiations can only be effective when there is a perceived value to the employer.** The negotiation presentation should include a description of the specific tasks that can be performed by the job seeker, the on-site and follow-up support to be provided, and, most importantly, how such an arrangement will benefit the business. Employment proposals can be informal and verbally negotiated or formal and in writing, depending on the relationship with the employer and business operating policies. A sample written proposal follows this article.

Effectively negotiated Customized Employment results when the job seeker and the employer jointly agree to the answers to these questions:

- What tasks can the job seeker do?
- What hours will the job seeker work?
- How much work does the employer want the job seeker to get done each day?
- How much will the job seeker be paid?
- What accommodations and support will be necessary?
- How will all this help the business?

Seven Steps to Successful Negotiation

Successful negotiations include several specific steps. These steps utilize a fundamental feature of good-sense negotiation: Start negotiating strengths (tasks to be performed) first, then negotiate job seeker needs.

STEP 1

Present tasks from the task list that might be reassigned.

STEP 2

Outline how these tasks might be reassigned to the job seeker you are representing.

STEP 3

Highlight the skills of the job seeker and how these skills can be used to complete the tasks.

STEP 4

State the potential benefits to the employer as a result of assigning identified tasks to the job seeker.

STEP 5

Discuss what your role (and your organization’s role) will be in supporting the job seeker.

STEP 6

Make the “ask”; that is, directly pose next steps to the employer. *Does this look like it will work for you? Do you have more questions? Is there anything else I can do to make this work for you? Can we set a start date?*

STEP 7

Reiterate the potential benefits of the arrangements to the employer: How it will increase other workers’ productivity, save money, generate more sales, etc.

Additional negotiating points will include the hours of the job, wages, support and accommodation strategies, and productivity and outcome expectations.

4. Ensure Post-Hire Success

The deal should never be considered sealed, however, until all the parties are satisfied with the outcomes of the arrangements. Even after the job seeker starts the job, there are often circumstances where renegotiating specific job aspects may be necessary.

One aspect of ensuring post-hire success is seeking continuous feedback from the employer. Based on the feedback provided, be ready to adjust supports and services. When evaluating post-hire activity, personal representatives can ask:

- How are we doing in meeting your needs?
- What do you like about our service?
- What could be improved?
- Are there additional things we can do to make sure the new employee is fulfilling expectations?

Remember, **both** the job seeker **and** the employer are customers of the person assisting with negotiation! This means doing what was promised and providing support to the job seeker **and** the employer in the agreed-upon fashion. Such follow-up not only helps identify areas where task assignments and supports need to be adjusted—it also shows the employer that you are sensitive to and considerate of the business’s ultimate benefit.

Customized Employment Success Story

Colin is a job seeker with a particular interest and skill in organizing clothing and personal items. His initial task list, developed during the exploration phase, included sorting clothing inventory, sorting items according to size and color, and matching misplaced items. He cannot read but can recognize numbers and colors. He wanted to work in a retail store near his home.

After an informational interview and follow-up visits to a nearby retail clothing store, Marie (his personal representative) found that the store’s shoe department was in constant chaos: shoes in the wrong boxes, shoes not returned to the shelves after customers tried them on, and lack of organization in the back room. Customer volume made it difficult for the sales department to keep up with these tasks.

Marie helped negotiate a customized position, called a “sales associate assistant,” in the store’s shoe department with tasks reassigned from sales associate job descriptions. An example of how the business benefited from this arrangement is illustrated in the chart below.

| Refined Task List, Assigned to New Employee | Benefits to the Business as a Result |
|--|--|
| <ul style="list-style-type: none"> • Receives and unpacks shoe shipments • Sorts shoes into size categories • Puts sensors and tags on shoes • Delivers shoes to proper rack • Retrieves returned shoes | <ul style="list-style-type: none"> • Work flow of shipments reorganized so all shoes are always in the right place and everyone can find the right shoes • Fewer customer complaints about the department • Improved customer satisfaction • Increased sales |

It was an easy matter for the employer to agree to this newly created sales associate position once it was clear how it would solve an ongoing operational problem and ultimately add to the store’s bottom line. As the store manager said, “Nothing beats showing me how you can make my life easier!” A starting wage was negotiated that mirrored the starting hourly wage of the store’s sales clerks, and the hours were negotiated based on the store’s needs and the job seeker’s availability. Production expectations were adjusted several times once the new employee began the job, since it was a new arrangement for the store. Making the arrangement work after the hire was also a key to an ultimately successful negotiation. See the attached sample employment proposal for Colin’s Customized Employment opportunity.

Sample Employment Proposal

[Date]

Mr. Frank Jones, Manager
 Ross Dress for Less
 Anytown, State

Dear Frank,

It was a pleasure meeting you last week. I greatly appreciate the time you took showing me the operation of your store. I can see why so many people shop there!

I particularly appreciated learning about the shoe department and the challenges the sales clerks face in keeping the area organized. As we discussed, it is clear that help could be used in both the back room and on the sales floor. There seemed to be particular difficulty in keeping up with these tasks:

- Receiving and unpacking the new shipments
- Sorting shoes into size categories
- Putting sensors and tags on shoes
- Delivering shoes to the proper racks
- Retrieving returned shoes from the sales floor

These are tasks that could be reassigned from the shoe department clerks to Colin Smith, a job seeker I represent. He is very skilled at organizing items, matching them, and placing them in their assigned places. If he took care of these responsibilities, then the clerks could spend more time with customers and less time with these tasks. Then they could generate more sales, and you would receive fewer complaints from customers who cannot find the right sizes and styles.

Should you decide to try this, I would be available to help you organize Colin's work assignments and help teach him to perform them. I would also be available as long as necessary to identify and address performance expectations that you may have after he starts the job.

Is there a time next week that Colin and I can come in to discuss this in more detail? I will contact you to arrange this in the next few days. I believe that we can work together to make sure that your shoe department is generating more sales and customer satisfaction. I look forward to talking to you soon.

Sincerely,

Marie Thompson

Developing Self-Employment and Microenterprise: A Customized Employment Option

Self-employment is a Customized Employment option that matches a job seeker's dreams and talents to economic activity while designing support strategies that promote success. According to the U.S. Census, small business ownership represents the largest market segment of new and expanding employment options in the United States. The self-employment rate is growing by more than 20% annually, and microenterprises (companies comprising one to five workers) generated over 40% of all new jobs in the past decade. Currently, small businesses in this country create more jobs than Fortune 500 companies!

Who Can Own a Small Business?

Anyone can own a small business if proper support, adequate financing, and paying customers can be secured. Individuals with complex disabilities resulting from autism to cerebral palsy to schizophrenia to spinal cord injury own and operate businesses.

Why Consider Self-Employment?

Self-employment is not for everyone, but it is a career option with unique considerations. Job seekers may consider owning a full-time or part-time small business because it:

- Can provide the scheduling flexibility necessary to accommodate a disability or other life complexities
- Allows job seekers to express their talents in the open market
- Creates financial equity options that wage employment cannot always provide
- Provides options to manage income relative to one's cash, medical, and other benefits

Examples of Small Businesses Started by People with Disabilities

Construction equipment rentals and cost estimation, accounting and bookkeeping, pet gift baskets, mobile dog grooming, art and photography, technical and popular writing, snack and drink vending, apparel manufacture and retail, property inspection and management, landscaping, catering, jewelry-making, truck driving, computer repair and assembly, desktop publishing, small engine repair, power-washing services, firewood delivery, flower arrangement, water filtration systems sales, greeting card design, farming... the list goes on and on.

An Option for Saving Money!

Self-employment represents one of the few options to grow wealth for people who receive benefits from the Social Security Administration (SSA). For instance, the resource limit for individuals receiving Supplemental Security Income (SSI) is \$2,000. However, a business owner who receives SSI can potentially have more resources in their business account as long as those funds are required for the business. Profits and personal withdrawals can then be managed to maintain appropriate resource levels for SSI eligibility.

Assisting the Potential Small-Business Owner

Employment professionals can provide a range of supports and services to assist a job seeker to start their own small business. This can be achieved through the following strategies.

1. Establish a support team

Many job seekers benefit from a business team, selected by the job seeker, that helps sculpt the job seeker's ideas, interests, aspirations, and talents into a profitable enterprise.

Membership varies, but teams typically include a combination of family members, employment professionals, and an expert in small-business development. Each can bring unique assets to the team.

- **Family involvement** is traditional in small business and should be cultivated whenever possible. It can take the form of loans and cash gifts, transportation, assistance with production, networking, housing the operations, bookkeeping, etc.
- **Employment professionals** can help coordinate resources, provide input on funding alternatives, and identify supports required for success.
- **Experts** in small business development can consult on the creation of a business plan, financial statements, marketing and sales strategies, support services, and benefits analyses. Please see the resource list at the end of this article for places to access the support of such individuals.

2. Create the business plan

Businesses can truly benefit from a formal business plan. It should be noted that over 80% of small businesses are successful in the U.S., and since the majority of those do not have business plans, some flexibility in planning is recommended. However, a business plan is an absolute requirement of state Vocational Rehabilitation (VR) departments and SSA.

The process of creating the business plan is as important as the plan itself!

3. Secure funding

Funding for small businesses is available from numerous sources. Many microloan programs exist nationwide for those who qualify for and can afford the payments. Various state systems also provide numerous opportunities for financing that do not load an individual down with debt.

Remember, it is important to start with an exploration process with the potential business owner to provide a foundation for business plan development and to ensure that the job seeker truly wishes to pursue self-employment **before** initiating the business-related steps. See “Job Seeker Exploration: Laying the Groundwork for Customized Employment” for more information.

Accessing Support for Business Plans

Even though many community resources advise on business plans, few individuals exist who actually write plans. Accessing an expert with experience in working with job seekers with disabilities may be necessary to develop a plan for someone who cannot read or write, or has limited understanding of the impact of self-employment income on their benefits. Be sure that the business plan clearly articulates the specific duties of the business owner, any supports that are necessary, and the expected business roles of any employees and supporters.

For example:

- VR can pay for skill training, capital equipment, vehicle repairs and insurance, tools, work clothes, adaptive equipment, computers, job/business coaching, etc.
- WIA providers (e.g., One-Stops) may be able to purchase some needed items through Intensive Services funds.
- Community rehabilitation programs (e.g., those funded by state developmental disability and mental health agencies) can use general fund dollars to purchase a wide range of business necessities.

A collaborative funding approach is best, with each partner providing expertise and a portion of the financial assistance. (See “Blending or Braiding Public Funds: Securing Assets for Customized Employment” for more information about collaborative funding approaches.)

4. Line up training (if necessary)

Training for prospective business owners can be critical. This includes training to refine a skill required to produce goods and services in the business, such as attaining a welding certificate or a chef’s diploma. Training also can include attending classes in business ownership, many of which are available at no or low cost through local Small Business Development Centers (SBDC—see the resource section for website). Both employment professionals and potential small business owners can also benefit from such classes because they provide networking opportunities: a chance to meet potential suppliers, customers, and mentors.

Using a Plan for Achieving Self Support (PASS) to Fund Self-Employment

SSA is actively promoting business ownership to stimulate the employment of job seekers with disabilities through the Plan for Achieving Self Support (PASS). A PASS plan leverages an individual’s SSI payments to use in pursuing a career goal, and is one of the few financial options that can provide actual operating cash to businesses. PASS remains a critical complement to VR and/or WIA resources. For more information on PASS, see the resource section at the end of this portfolio.

Stories of Self-Employment: Kevin

Kevin is a man with developmental and behavioral disabilities who spent many years in a segregated facility-based employment setting (a sheltered workshop) before enrolling in a community employment project funded by the state Developmental Disability Council. Kevin’s interest in being a mechanic became clear, but no jobs were available for a young man without experience.

After many attempts, a local small engine repair shop agreed to have Kevin disassemble and clean a few motors every week. Because the single owner did not want employees, a business-within-a-business was created for Kevin to do disassembly and parts cleaning. In return for the space to operate this complementary service and for mentoring in mechanics from the host business owner, Kevin paid a small percentage of his earnings to the shop. VR support, general fund expenditures from the local developmental disabilities agency, and an SSA PASS plan provided Kevin with hand tools, work benches, a parts washer, and work clothes. Over seven years later, Kevin works 20 to 30 hours a week and charges approximately \$30 per hour for his services.

Sample of Small Business Resources

| Name | Address |
|---|--|
| The Abilities Fund | www.abilitiesfund.org |
| Association of Small Business Development Centers | www.asbdc-us.org |
| DisabilityInfo.gov: Self-Employment & Entrepreneurship | www.disabilityinfo.gov/digov-public/public/DisplayPage.do?parentFolderId=38 |
| Entrepreneur.com | www.entrepreneur.com |
| FirstGov | www.firstgov.gov |
| Forum for Women Entrepreneurs | www.fwe.org |
| Griffin-Hammis Associates, LLC | www.griffinhammis.com |
| Inc. | www.inc.com |
| Job Accommodation Network/Small Business and Self-Employment Service | www.jan.wvu.edu/sbses/index.htm |
| National Association of Women Business Owners | www.nawbo.org |
| National Center on Self-Employment and Disability | www.selfemploymentcenter.org |
| Office of Women's Business Ownership | www.womensbusinesscenter.org |
| Online Women's Business Center | www.onlinewbc.gov |
| The Rural Institute at the Univ. of Montana | http://ruralinstitute.umt.edu |
| Rural Institute: PASS Plans Online | www.passplan.org |
| SCORE: Counselors to America's Small Business | www.score.org |
| Social Security Administration: PASS Plans | www.ssa.gov |
| U.S. Dept. of Education | www.ed.gov/about/offices/list/osers/rsa/index.html |
| U.S. Dept. of Labor, Office of Disability Employment Policy | www.dol.gov/odep |
| U.S. Dept. of Agriculture | www.usda.gov/da/smallbus/index.htm |
| U.S. Small Business Administration | www.sba.gov |
| Virginia Commonwealth Univ. Rehabilitation Research and Training Center | www.worksupport.com |

For a more complete listing of resources, see www.jan.wvu.edu/sbses/ and www.dol.gov/odep/.

Stories of Self-Employment: Molly

Molly shared her interests in technology with her employment professional, who then arranged funding for a series of Microsoft certification classes. Molly began working as a part-time computer instructor at the local community college. However, panic attacks resulting from her psychiatric disability and exhaustion from her fibromyalgia caused her to lose that job. With assistance from the local VR office and a business design team including a local SBDC advisor, she began a mobile computer repair business specializing in assisting the growing community of retirees interested in learning basic computer and internet skills. The business soon branched out to include desktop publishing, specializing in formatting and printing local church and civic club newsletters.

Securing Assets for Customized Employment: Blending or Braiding Public Funds

A critical element in the Customized Employment process is the development and implementation of an individualized plan for employment based on the job seeker's talents, aspirations, and choices. The plan includes specified supports or services that the job seeker needs to become successfully employed. An individual budget can be developed to implement this plan that uses financial support from a range of public agencies in order to achieve the job seeker's goals. These agencies can include, but are not limited to:

- State department of Vocational Rehabilitation (VR)
- Social Security Administration (SSA)
- Department of Labor (DOL)
- Developmental disability and mental health services

These public agencies each have funds that can be blended or braided. Using funding from multiple sources can allow for more creative planning and contribute to a successful outcome.

What Is Blended Funding?

Blended funding occurs when public funders authorize their dollars to be utilized within an individual budget to respond to identified needs or gaps in services and supports. These funds may be blended into one lump sum for use as needed, or divided into budget categories. Regardless, the use of the funds is under the direction and control of the job seeker, with assistance from a host agency.

What Is Braided Funding?

Braided funding also involves more than one public funder authorizing their dollars to be included in an individual budget. However, with braided funding, each public funder maintains control of its dollars. Each tracks expenditures for agreed purposes and evaluates return on investment.

A New Level of Collaboration

Blended and braided funding approaches require a new level of coordination and collaboration among public funders. Each funding source has different reporting requirements, payment arrangements, funding cycles, and approaches to evaluating return on investment.

To meet multiple stakeholder needs, one agency may become the lead or single point of responsibility for assessing service impact. This agency may also monitor expenditures through a negotiated set of reporting requirements.

Balancing Job Seeker Control

Agency accountability for public expenditures must be balanced with job seeker control, choice, and decision-making. Job seekers and funding agencies must also decide who will provide the services, and determine resource allocation to cover costs.

The Advantages to Blending or Braiding Funds Are Significant

Blending or braiding funds can:

- Permit systems to fund activities that may fall outside the specified limits of categorical programs
- Allow separate funding streams to be used in flexible and coordinated ways to implement the customized plan's objective more effectively
- Result in more efficient use of limited resources as agencies work together to overcome barriers and eliminate duplication
- Create greater direction and control of public resources by the job seeker
- Establish a method for meeting the range of a job seeker's needs that any single funder could not effectively respond to alone

So What Next? Thinking About Self-Directed Accounts

Whatever the collaborative funding method chosen (blended or braided), dollars can be placed in individual self-directed accounts. Such accounts hold one or more sources of employment service dollars that are dedicated to the job seeker and their employment plan. Fundamental to this funding approach is the principle that the job seeker has choice and control regarding the services and supports used, including the selection of traditional or nontraditional employment provider(s).

Where to Find Funding to Blend or Braid for Self-Directed Accounts

No single source of funds or resources is likely to respond effectively to multiple barriers to employment. Consider the following funding sources that authorize self-directed accounts to support enhanced coordination of resources (*see table on page 22*).

Understanding the Challenges

It is important to realize that blending and braiding funds is not without challenges. Some public funders are reluctant to blend their dollars in an individual budget because of the loss of control over how the funds will be spent. Others have reporting requirements that expect all funds to be tracked and accounted for after being allocated to an eligible job seeker in need of specific supports and services. These requirements can sometimes limit flexibility.

Resources for Self-Directed Funding

| Agency | Program |
|---|--|
| Health and Human Services: Centers for Medicaid and Medicare Services | Home and Community-Based Waivers <ul style="list-style-type: none"> • Individual budgets for long-term supports |
| Social Security Administration | Ticket to Work <ul style="list-style-type: none"> • Voucher for employment services delivered by an Employment Network Plan to Achieve Self-Support (PASS) • Excludes income or resources saved for vocationally related objectives that would otherwise be counted in determining SSI eligibility |
| Department of Labor: Employment and Training Administration | Individual Training Account (ITAs) <ul style="list-style-type: none"> • Voucher to purchase skills development training/resources |
| Health and Human Services: Office of Community Services | Individual Development Accounts (IDAs) <ul style="list-style-type: none"> • Matched savings plans for buying a first home, starting a business, or pursuing postsecondary education |
| Education: Rehabilitation Services Administration | Individual Employment Plan, Title IV of WIA <ul style="list-style-type: none"> • Cash advance or purchase of services for employment-related objectives |
| Mental Health: Center for Mental Health Services | Mental Health Block Grant Person-centered recovery plans used for <ul style="list-style-type: none"> • Rehabilitative services • Service coordination • Self-directed care • Behavioral health care |
| State Developmental Disability Agencies | State and local initiatives |

Braided Funding Success Story

Mary is a young woman who has a disability as the result of a car accident. This accident led her to drop out of college and begin receiving monthly SSI payments. She registered for services at her local One-Stop and expressed interest in a career in graphic design. In collaboration with VR and a Medicaid support coordinator, a counselor at the One-Stop formed a work group to look at options to contribute resources to an individual account to implement the Customized Employment plan that Mary developed.

The group arranged funds so that WIA paid for computer classes at the community college as part of an Individual Training Account, VR purchased a computer and adaptive equipment for home use, and Medicaid covered the cost of transportation from Mary's home to school. Mary was accountable to each funding source to use the funds for the specific, agreed-upon purposes. Each agency alone could not have met all of Mary's needs, but when they braided funds they could respond to Mary's interest in upgrading her self-taught web design skills and pursuing her future career in graphic design.

Eight Steps for Blending or Braiding Funds for Self-Directed Accounts

When working with a job seeker to blend or braid funds for a self-directed account, the following considerations are crucial.

1. Review and understand the menu of available benefits and resources

Start by identifying the resources available from each funder. For each source, understand the definition of service units and the rate of reimbursement for each type of service provided. (Rates of reimbursement may include annual funding limits per individual or service, or lifetime caps or funding limits.) Determine the flexibility in rate setting, service units, and licensing/certification requirements for service providers.

2. For each resource identified, review and understand eligibility requirements

This includes the definition of disability used by the funder and the means tested (e.g., income levels and resource limits). There may be additional requirements, such as order of selection (a VR process that establishes priorities when funds are limited) or identification as a funder of last resort. Eligibility redetermination procedures and frequency are also important to understand.

3. Review and understand documentation requirements

This may include required documentation of medical disability, income and resource limits, or proof of residence.

4. Review and understand the application process

Examine the forms to be filled out and the possibility of filing online. Identify locations for filing (such as a One-Stop Career Center) as well as the availability of assistance with the application.

5. Review and understand the appeal process

This includes appealing at any stage in the blended or braided funding process: eligibility, application, redetermination of eligibility, documentation of need, parameters of funding to meet identified needs, etc.

6. Establish a self-directed account work group

Create a team of representatives from each funding source to explore opportunities to improve coordination, advance the job seeker's independence and self-sufficiency, and identify a shared vision and values. When you bring a group together, decisions can be negotiated to streamline procedures, and a blended or braided individual budget can be pilot-tested before officially starting.

7. Create the individual self-directed account to meet Customized Employment goals

Understand, simplify, and coordinate the application process across funders. Ensure that background information is centralized and shared for each job seeker. If needed, identify a lead agency to be responsible for tracking and reporting expenditures to multiple funders. Each public funder needs to review and understand the detailed requirements of each other's public authorities.

8. Offer training and support to job seekers and family members, as necessary, to deal with the issues involved in directing public funds

While significant individual latitude should be given, experience has shown that these strategies require skills and understanding by the job seeker and/or family members in order to fully realize the potential benefits. It may be necessary to have topical trainings and opportunities for discussions with all parties.



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