

Employment First State Leadership Mentoring Program (EFSLMP)

PROVIDER TRANSFORMATION MANUAL

Module 6: Reorganizing Staff for Transformative Change

Pilot Version

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Table of Contents

[Introduction 1](#_Toc520100226)

[More on the EFSLMP Approach to Provider Transformation 4](#_Toc520100227)

[The Case for Organizational Transformation: Why Do It and Why Now? 5](#_Toc520100228)

[Determining Staffing Needs 12](#_Toc520100229)

[Revisiting Job Descriptions 13](#_Toc520100230)

[Filling Staff Positions: Recruiting, Interviewing, Orienting, Training, Evaluating, Supporting, Empowering and Retaining Staff 13](#_Toc520100231)

[Recruiting 13](#_Toc520100232)

[Interviewing 14](#_Toc520100233)

[Staff orientation and training 15](#_Toc520100234)

[Evaluating staff performance 18](#_Toc520100235)

[Supporting staff 18](#_Toc520100236)

[Empowering staff on the front lines 19](#_Toc520100237)

[Staff retention 19](#_Toc520100238)

[Team Building and Self-Directed Teams 20](#_Toc520100239)

[Attachment to Module 6 22](#_Toc520100240)

[Conclusion 24](#_Toc520100241)

List of Exhibits

[Exhibit 1. National Baldrige Model’s Criteria for Performance Excellence 1](#_bookmark1)

[Exhibit 2. Criteria in Performance Excellence in Employment First – Provider Transformation 2](#_bookmark4)

# Introduction

This manual has been created to capture learning from, and support the continued success of, the Employment First State Leadership Mentoring Program (EFSLMP), an initiative of the U.S. Department of Labor, Office of Disability Employment Policy (ODEP).[1](#_bookmark2) The EFSLMP is a cross-disability, cross-systems change initiative providing a platform for multi-disciplinary state teams to focus on implementing ***Employment First***[***2***](#_bookmark3)with fidelity through the alignment of policies, coordination of resources, and updating of service delivery models to facilitate increased integrated employment options for people with the most significant disabilities.

ODEP recognizes ***Employment First*** as a national movement providing a framework for systems change that is centered on the premise that all citizens, including individuals with complex disabilities, are capable of full participation in integrated employment and community life. ODEP defines ***Employment First*** as the expectation that public systems align policies, practices, and reimbursement structures to foster competitive integrated employment as the priority option in publicly-financed day and employment services for youth and adults with significant disabilities.

ODEP recognizes that the achievement of ***Employment First*** requires transformation of both public systems and service providers. To guide this two-pronged approach to Systems Change, ODEP has adopted the National Baldrige Model’s Criteria for Performance Excellence [see Exhibit 1] which includes seven key elements: Leadership; Strategic Planning; Customer Focus; Workforce Focus; Operations Focus; Results; and Ongoing Measurement, Analysis, and Knowledge.

Exhibit 1. National Baldrige Model’s Criteria for Performance Excellence

Strategic

Planning

Workforce

Focus

Leadership

Results

Customer

Focus

Operations

Focus

Measurement, Analysis, and Knowledge Management

Source: <http://www.nist.gov/baldrige>

To facilitate provider transformation using the Baldrige approach, ODEP has developed a set of *Criteria for Performance Excellence in Employment First Provider Transformation* [see Exhibit 2]. This provider transformation manual builds on the criteria that have been developed, offering significant, detailed information, advice and examples based on best practices for provider transformation developed through the

1 This edition will be used as a pilot model. Our goal is to receive feedback over the course of the EFSLMP Community of Practice (CoP) webinar series throughout the rest of the year regarding the usefulness and applicability of the manual.

2 <https://www.dol.gov/odep/topics/EmploymentFirst.htm>

EFSLMP and derived from the experience and expertise of EFSLMP subject matter experts working on transformation with providers around the country.

Exhibit 2. Criteria in Performance Excellence in Employment First – Provider Transformation[3](#_bookmark5)

|  |  |
| --- | --- |
| Leadership | * Promote ongoing professional development and mentoring of leaders within provider networks to cultivate a cadre of strong leadership capable and committed to the development of competitive, integrated employment outcomes and socioeconomic advancement for people with disabilities. * Build in incentives for supporting, retaining, and rewarding “early adopters” of effective practices among staff. |
| Strategic Planning | * Infuse & embed the State’s *Employment First* vision, goals, guiding principles, & conceptual framework within the strategic planning processes, consistent with similar efforts undertaken across relevant State government agencies. * Develop, disseminate, and make readily available the provision of effective practices that lead to competitive, integrated employment for individuals with disabilities, as well as benefits planning, financial capability, and economic advancement strategies for all clients. * Develop operational agreements across various state publicly-financed systems and provider networks resulting in the alignment of policy, practice, and funding strategies to allow for a consistent focus on performance-based results. |
| Customer Focus | * Survey customers & stakeholders regularly to understand level of satisfaction & determine the areas of improvement needed. * Review service coordination processes to determine whether key steps in the process could be strengthened in terms of being more focused on person-centered, individual strategies, and experiential informed choice. * Expand and improve upon existing assessment processes to ensure a rich collection of data on the individual’s strengths, gifts, and preferences that can be used to leverage multiple options. |
| Workforce Focus: | * Realign organizational structure and standard operating procedures (SOPs) to allow the time, flexibility, and incentives required to develop professional staff in key areas critical to successful transformation. * Ensure ongoing professional development, mentoring, coaching, and staff support promoting continued strengthening of skill sets critical for expanded business models. * Optimize service time and ratio deployment for provision of long-term supports, crisis interventions, and new job starts within provider network. * Consider incentives for staff to facilitate clear measurable performance outcomes for competitive, integrated employment and to effectively address individual and cultural resistance to change. |
| Operations Focus | * Diversify funding streams to optimize available support for competitive, integrated employment services. * Expand the provision of services to include a stronger focus on the dissemination of effective practices that result in competitive, integrated employment outcomes. * Promote the modernization of operational processes including IT//electronic record-keeping and decentralized staffing models to successfully meet growing demand for the provision of competitive, integrated employment strategies. * Consider reconfiguration of service management elements within provider organizations (including, but not limited to, communication, data collection, logistics, technology, transportation, billing systems, supervision, and customer satisfaction) and infusion of “lean management” techniques. |
| Results | * Grow percentage of competitive, integrated employment placements over baseline, and capture length of time from start of service to placement. * Coordinate employment efforts with other long-term supports (housing, transportation, natural supports) and benefits planning/work incentives. * Survey customers & stakeholders regularly to understand level of satisfaction & determine the areas of improvement needed. * Track staff development milestones, including training/TA received, credentials/certification completed, etc. * Track impact of applying effective practices to internal daily operations and service approaches. * Demonstrate cost-effectiveness of competitive, integrated employment supports through maximization of natural workplace supports, assistive technology, and job customization. * Align policies, operational procedures, and funding to reflect adoption of effective practices and competitive, integrated employment service delivery. |
| Measurement, Analysis, and Knowledge Management | * Create shared performance-based outcomes & corresponding metrics across various divisions of the organization to incentivize effective coordination of human & technical resources & collective action around pursuance of organizational strategic goals. * Establish bench-marks from baseline data and collect high-impact, relevant data to help inform continued organizational restructuring, internal policy changes, operational practice updates, and development strategies. * Translate high-impact knowledge through continued commitment to training, technical assistance, professional development and communities of practice. |

3 [http://www.leadcenter.org/system/files/resource/downloadable\_version/Employment\_First\_Technical\_Brief 3\_0.pdf](http://www.leadcenter.org/system/files/resource/downloadable_version/Employment_First_Technical_Brief__3_0.pdf)

The reader will note that the manual has been organized with individual modules that each focus on one element of the Baldrige model. In addition, modules on two other critical topics for success – bringing provider transformation to scale and being a mentor to other providers – are also included to round out this comprehensive manual. Readers can opt to use the manual as a comprehensive resource or to pull-out specific modules as they are needed during the process of transformation.

## More on the EFSLMP Approach to Provider Transformation

The EFSLMP has developed a unique approach to supporting provider transformation in a comprehensive way. The approach brings together the collective experiences of over thirty Subject Matter Experts from around the country, all of whom are either disability employment service providers themselves – who have shepherded

their organizations through a process of transformation - or integrated employment and community supports experts who have provided support, technical assistance and training to disability employment and day service providers from around the country who have been actively engaged in organizational transformation. ODEP’s EFSLMP Subject Matter Experts are both, by definition and by design, an eclectic group of people with tremendous breadth of experiences and knowledge. This is particularly valuable in supporting provider transformation on a national scale because:



**Transformation:**

It takes the desire to change, the determination to start, and the dedication to continue.

* Ben Timmis

**Transformation:**

It isn’t about improving, it’s about re- thinking.

* Malcolm Gladwell
  + - No two providers’ transformation process and circumstances are the same, even if providers may operate in the same state or locality;
    - The nature of provider transformation has changed over time, both within particular states and nationally;
    - Core best practices for successful provider transformation – practices that are considered “tried and true” among those who make this topic their life’s work – can be implemented in many subtly different ways depending on a particular provider’s circumstances and challenges;
    - Effective mentoring relationships cannot be forced, and rely most heavily on “smart” matching of leaders and organizations who will “gel” in truly impactful ways;
    - Communities of practice that bring together Subject Matter Experts and diverse providers on the path of organizational transformation can enhance learning, information exchange, mutual support structures and translation of knowledge.

The EFSLMP Provider Transformation Initiative brings together many experts with a deep historical perspective on provider transformation. This has greatly enhanced the project’s ability to build on and further expand the historical knowledge base for provider transformation. In addition, one of the most important contributions of the EFSLMP Provider Transformation initiative has been to modernize, and recast as necessary, long-standing best practices into strategies that are geared toward the ***current realities- both challenges and opportunities*** facing traditional employment and day service providers across the country.

## The Case for Organizational Transformation: Why Do It and Why Now?

This manual’s publication date is 2017—twenty-seven years after the passage of the Americans with Disabilities Act. A quarter of a century ago, a very small number of community rehabilitation providers across the country, including some facility-based day service providers were engaged in organizational transformation. At the same time, federal supported employment capacity building grants were beginning to make a positive impact in many states, demonstrating



… in the past five years (2011-2016), an evolution in thinking has taken place across the field of disabilities that has set the stage for competitive integrated employment and integrated community supports to become the primary service models for transition-age youth and working-age adults with disabilities in every state.

the valuable outcomes that supported employment could bring to individuals with significant disabilities. Yet overall, there was not any sense that a major evolution in employment and daytime support services for people with disabilities was just around the corner.

And while it’s true that the intervening years leading up to 2011 did not bring to scale, to the extent many had anticipated, the systemic momentum and best practices built in the early years of supported employment, it is hard for anyone to deny that in the past five years (2011-2016), an evolution in thinking has taken place across the field of disabilities that has

set the stage for competitive integrated employment and integrated community supports to become the primary service models for transition-age youth and working-age adults with disabilities in every state. This broad-based evolution of thinking has been ushered in through a variety of different, but coinciding federal policy initiatives, state-level reforms, legal actions, and media coverage that collectively have begun to reshape public opinion. Among the most influential developments of the past five years are the following:

* + - The June 2011 Statement of the ***Department of Justice*** on Enforcement of the Integration Mandate of Title II of the Americans with Disabilities Act and *Olmstead v. L.C.* This Statement[4](#_bookmark8) established for the first time, an expectation that compliance with the ADA and *Olmstead* required states to have an effective working plan to address “individuals spending their days in sheltered workshops or segregated day programs” and which “must have demonstrated success in actually moving individuals to integrated settings in accordance with the plan.” Most of the *Olmstead* lawsuits and settlement agreements that came after this Statement have had a strong focus (and in the cases of Oregon and Rhode Island, an exclusive focus) on transitioning publicly funded state systems away from segregated employment and day services to individualized supported employment and integrated community supports.[5](#_bookmark9)

4 See [https://www.ada.gov/olmstead/q&a\_olmstead.htm](https://www.ada.gov/olmstead/q%26a_olmstead.htm)

5 See U.S. Department of Justice settlement agreements with the states of Georgia, Delaware, North Carolina, and Virginia, as well as the settlement agreement with the state of Oregon and the consent decree with the state of Rhode Island. See <https://www.ada.gov/olmstead/>for more information.

* + - The September 2011 Informational Bulletin[6](#_bookmark10) released by the ***Centers for Medicare and Medicaid Services (CMS)*** which provided strong guidance regarding employment and employment-related services in Medicaid Home and Community-Based Services (HCBS) Waivers.[7](#_bookmark11) This guidance underscores CMS’s commitment to the importance of competitive integrated employment and self-employment opportunities for waiver participants. The guidance is now part of the Technical Guide states must follow in creating, renewing or amending HCBS Waivers, and it contains a strong expectation from CMS that states will use HCBS Waivers to increase competitive integrated employment opportunities and meaningful community integration for HCBS Waiver participants with disabilities.
    - The August 2012 report by the ***National Council on Disability***, a federal agency, calling for a phase out of sub-minimum wage.[8](#_bookmark12) This report both preceded and followed local, state and national media coverage of the use of sub-minimum wage in the employment of people with disabilities. Meanwhile, legislation to phase out and end the use of Section 14(c) special minimum wage has been introduced multiple times in ***Congress***, first in October of 2011, then in February of 2013 and most recently, in January of 2015. The current House bill (HR 188) has 69 co-sponsors from both sides of the aisle, as of June, 2016, and the Senate companion (S. 2001) is bipartisan as well. Additionally, the Workforce Innovation and Opportunity Act (WIOA), passed in July of 2014, established an ***Advisory Committee to the U.S. Department of Labor*** charged in part with making recommendations regarding the future of Section 14(c). WIOA also introduced restrictions on the ability of employers to pay youth a sub-minimum wage and new requirements for state vocational rehabilitation agencies to conduct annual outreach to all state residents with disabilities being paid sub-minimum wage to offer services that would allow these individuals to obtain competitive integrated employment paying at least minimum wage. And most recently, in March of 2016, the ***AbilityOne Commission*** issued a Declaration in support of minimum wage for all people who are blind or have significant disabilities.[9](#_bookmark13)
    - The September 2013 promulgation of a new rule, by the ***U.S. Department of Labor’s Office of Federal Contract Compliance Programs***, governing the implementation of Section 503 of the Rehabilitation Act which prohibits federal contractors and subcontractors from discriminating in employment against individuals with disabilities and requires these employers to take affirmative action to recruit, hire, promote, and retain individuals with disabilities. The rule strengthens the affirmative action provisions of the regulations, requiring increased efforts by contractors to recruit and hire people with disabilities, and improve job opportunities for individuals with disabilities.
    - The February 2014 Executive Order 13658, signed by ***President Barack Obama***, “Establishing a Minimum Wage for Contractors,” to raise the minimum wage to $10.10 for all workers on Federal construction and service contracts, including all workers with disabilities whether covered under the Section 14(c) special minimum wage certificate program or not.

6 See <https://downloads.cms.gov/cmsgov/archived-downloads/CMCSBulletins/downloads/CIB-9-16-11.pdf>

7 Medicaid HCBS Waivers first became available in 1983 when Congress added section 1915(c) to the Social Security Act, giving States the option to receive a waiver of Medicaid rules governing institutional care. Medicaid HCBS Waivers allow a state to offer services and supports to people with disabilities, otherwise qualified for institutional care, in the community.

8 <https://www.ncd.gov/publications/2012/August232012>

9 <http://www.abilityone.gov/commission/documents/US%20AbilityOne%20Commission%20Declaration%2018March2016%20Final.pdf>

* + - The March 2014 promulgation of the Medicaid Home and Community-Based Settings Rule by the ***Centers for Medicare and Medicaid Services (CMS)*** which requires all HCBS settings eligible for Medicaid funding to provide opportunities for individuals to pursue employment, work in competitive integrated settings, and engage in community life. The rule further requires all HCBS settings eligible for Medicaid funding to be integrated in, and support full access to, the greater community. And finally, the rule establishes a requirement that states must offer HCBS participants an opportunity to receive HCBS services in non-disability-specific settings, thus requiring states to develop and offer integrated prevocational and day habilitation service models if the state had only facility-based prevocational and day habilitation service options prior to the implementation of the rule.[10](#_bookmark14)
    - The July 2014 passage into law of the ***Workforce Innovation and Opportunity Act (WIOA)***, raising expectations across state workforce and vocational rehabilitation systems that competitive integrated employment be the prioritized investment and outcome for transition-age youth and adults with disabilities. WIOA ushered in the expectation that state workforce system programs achieve true programmatic accessibility for individuals with disabilities, while also introducing new requirements for state vocational rehabilitation agencies to provide pre-employment transition services to youth with disabilities enrolled in secondary education.
    - The May 2016 promulgation of new Medicaid Managed Care Rules by the ***Centers for Medicare and Medicaid Services (CMS)*** which requires states and managed care organizations to ensure access to, and supports for, competitive integrated employment in Medicaid Managed Long-Term Services and Supports programs that serve persons with disabilities. Prior to the issuance of these rules, numerous states moving to Medicaid Managed Care had built in expectations for increasing competitive integrated employment outcomes for enrollees with



… a number of federally funded grant and technical assistance initiatives include a focus on supporting provider transformation, extending mentoring, training, technical assistance and other key support strategies to a growing number of disability service providers across the country that are seeking such supports to evolve their organization’s services to align with changing expectations and opportunities.

disabilities.

Throughout this time, the country has also seen an array of federally funded grant and technical assistance initiatives aimed at increasing competitive integrated employment opportunities for transition-age youth and adults with disabilities, including an emphasis on facilitating systems change and implementing policies consistent with ***Employment First***. In addition to EFSLMP, a number of other federally funded grant and technical assistance initiatives include a focus on supporting provider transformation by extending mentoring,

training, technical assistance and other key support strategies to a growing number of disability service providers across the country that are seeking such supports to evolve their organization’s services to align with changing expectations and opportunities.

10 https:[//w](http://www.cms.gov/Newsroom/MediaReleaseDatabase/Fact-sheets/2014-Fact-sheets-items/2014-01-10-2.html)ww[.cms.gov/Newsroom/MediaReleaseDatabase/Fact-sheets/2014-Fact-sheets-items/2014-01-10-2.html](http://www.cms.gov/Newsroom/MediaReleaseDatabase/Fact-sheets/2014-Fact-sheets-items/2014-01-10-2.html)

At the same time, our nation’s economy is beginning to recover from one of the most serious and long- standing recessions in history. Coupled with this is the stark reality that our workforce is fundamentally changing. With baby boomers now retiring in record



Yet at the end of the day, what appears to be moving more and more disability service provider organizations to embrace sustained organizational transformation is the recognition of the benefits and possibilities that transformation brings to the people with disabilities each of these organizations serves.

numbers, most every industry and economic sector is projecting major workforce shortages in the decades to come. And there is a recognition that American workers are changing as well, with the millennials ushering in expectations for a better work-life balance and greater workplace flexibility. As employers of all kinds respond to these trends, there is a groundswell of interest in non-traditional labor pools and groups that are untapped and/or underrepresented in the current labor

market, with individuals with disabilities being a key part of these groups. Further, there is growing interest in

progressive and innovative approaches to human resource (talent) management, including Customized Employment[11](#_bookmark15) and the concept of a Teachable Fit[12](#_bookmark16) to bridge the divide between employers and the new face of America’s modern workforce. These approaches not only make room for workers with disabilities but endorse fundamental strategies that pave the way for increased hiring of workers with all kinds of disabilities into competitive integrated employment situations.

For several decades, we have seen the emergence of a research and evidence base for competitive integrated employment services, thus enabling disability service providers to fill their toolboxes with a variety of innovative and “proven to work” strategies for facilitating competitive integrated employment outcomes for individuals with various types of significant disabilities. In the last decade, research addressing the connection between competitive integrated employment and positive health and mental health outcomes has increased, as has research demonstrating the cost-effectiveness of public investments in supported employment.

As federal and state funders of disability services increase emphasis on integrated service provision and competitive integrated employment services in particular, providers of more traditional employment and day services are no doubt feeling the pressure to participate in this evolution and bring their organizations and practices into full alignment with the many developments discussed above that have come about in rapid succession in recent years. Yet at the end of the day, what appears to be moving more and more traditional employment and day service provider organizations to embrace sustained organizational transformation is the recognition of the benefits and possibilities that transformation brings to the people with disabilities each of these organizations serves. What’s more, organizations embracing transformation are also finding that staff at all levels of the organization are similarly positively affected, finding new energy, passion and satisfaction in doing new work that is changing their roles and their impact on the people with disabilities they support and

11 [https://www.accenture.com/t20150824T010002 w /us-en/\_acnmedia/Accenture/Conversion-](https://www.accenture.com/t20150824T010002__w__/us-en/_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Strategy_7/Accenture-Trends-Reshaping-HR-Workforce-One.pdf) [Assets/DotCom/Documents/Global/PDF/Strategy\_7/Accenture-Trends-Reshaping-HR-Workforce-One.pdf](https://www.accenture.com/t20150824T010002__w__/us-en/_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Strategy_7/Accenture-Trends-Reshaping-HR-Workforce-One.pdf) and <https://www.dol.gov/odep/documents/vignette_v3_blue_508_final.pdf> For more information on Customized Employment, also see: <https://www.dol.gov/odep/topics/CustomizedEmployment.htm>and

<http://www.leadcenter.org/customized-employment>

12 <https://www.manpowergroup.com.au/documents/White-Papers/2010_Teachable-Fit-Framework.pdf>

their communities. As one thirty five-year veteran manager of employment services from a community rehabilitation provider in Wisconsin put it:

“When you have staff achieve an employment goal with someone, and you see the joy that they experience with that individual…and you have someone come into your office and say ‘Yes! I’m a working man now. I’m going to be a working man now!’ it really brings home to you why you are putting all of this effort into this.”[13](#_bookmark17)

And finally, it seems clear that organizations engaged in transformation are recognizing the positive benefits of this work on their reputation and standing in the wider community. They are finding support is increasing from the local business community and their traditional community supporters. They are also finding significantly increased support from their funding sources that are equally invested in their success. And they are finding that peer organizations, both from within the state and from other states, are now looking to them for advice, mentoring and technical assistance.

If these outcomes are the kinds of outcomes that resonate with you and your organization, then transformation is the right next step. This manual brings together in one place, the best strategies, tips, lessons learned and perspectives on provider transformation to help you and your organization get started, or if you have already started, to help you and your organization continue your efforts and ultimately achieve the best possible success with transformation.

13 To view a video on organizational transformation efforts in Wisconsin and the perspective of this and other community rehabilitation provider directors and managers, see: <https://www.youtube.com/watch?v=xd3qgUwLHbw>

**Module 6:**

**Reorganizing Staff for Transformative Change**

**Key Terms**

*Dispersed Cluster Approach Self-Directed Teams*

References and Resources for Module 6- Reorganizing Staff for Transformative Change

|  |  |
| --- | --- |
| Recourses | |
| Filling Staff Positions: Recruiting, Interviewing, Orienting, Training, Evaluating, Supporting, Empowering and Retaining Staff | |
| Interviewing (p. 85): ODEP archived training webinars | <http://www.leadcenter.org/customized-employment> |
| Interviewing (p. 85): Association for Community Rehabilitation Educators trainings | [www.acreducators.org](http://www.acreducators.org/) |
| Interviewing (p. 85): Federally Funded Regional Training and Resource Centers List | [https://acl.gov/Programs/NIDILRR/Grant-](https://acl.gov/Programs/NIDILRR/Grant-Funding/Programs/rrtc/resources.aspx) [Funding/Programs/rrtc/resources.aspx](https://acl.gov/Programs/NIDILRR/Grant-Funding/Programs/rrtc/resources.aspx) |
| Interviewing (p. 85): Griffin Hammis Associates training | <http://www.griffinhammis.com/> |
| Interviewing (p. 85): Marc Gold and Associates training | [www.marcgold.com](http://www.marcgold.com/) |
| Interviewing (p. 85): TransCen training | <http://www.transcen.org/> |
| Interviewing (p. 85): Virginia Commonwealth University | [www.directcourseonline.com](http://www.directcourseonline.com/) |
| Interviewing (p. 85): College of Employment Services | [www.directcourseonline.com](http://www.directcourseonline.com/) |
| Interviewing (p. 85): Training Resource Network | <https://disabilitywebtraining.com/> |
| References | |
| Supported employment and workplace supports: A qualitative study. | Rogan, P., Banks, B., & Howard Herbein, M. (2003). Journal of Vocational Rehabilitation, 19 (1), 5-18. |

**MODULE 6: Reorganizing Staff for Transformative Change**

## Determining Staffing Needs

Agencies are accustomed to organizing personnel and operations in a manner that supports services that they have traditionally provided. They may sometimes reorganize to accommodate the addition of new services or the expansion of current services, but they rarely step back to completely rethink their structure, and the staff positions within it, to address a new focus. When an agency is transforming to support competitive integrated employment, they must take this important step and organize services and supports around people. It is a time when all positions should be reconsidered.

The focus of all staff efforts, irrespective of the funding stream or service the person is receiving, should be aimed at encouraging, preparing and enabling individuals to obtain and maintain competitive integrated employment. That may mean that in the short term, some staff stay in their current positions but have a new focus and different responsibilities. But over the longer term as the agency is moving toward more and more people working and seeking jobs in the community, increased numbers of staff positions should be allocated to your employment efforts. Some new positions may be added while others are revised, reduced or eliminated. Ultimately, the preponderance of positions should be ones that directly support competitive integrated employment, such as employment specialists and job developers.

*What staffing ratio should I budget for?*

While competitive integrated employment services are always delivered on a one-to-one basis, how many individuals a job coach or job developer can work with at one time will vary significantly depending on how you choose to organize your job development and job coaching functions and the support needs of the individual job seekers. It will also be impacted by the stage job seekers are in as they move through the employment process. One pitfall you will certainly want to avoid is matching people to jobs from which staff cannot fade to a reasonable extent, given the person’s level of disability, in a reasonable timeframe. Poor job matches that result in little or no fading will require intensive 1:1 staffing which will consume much staff time and make it difficult to serve as many people in the ratios you have budgeted. Poor job matches can include jobs where the tasks and duties are not a good fit with the person’s skills, where the environment creates too many challenges for the person to stay on task and accomplish his/her duties, or where there are no natural supports present that can provide the intermittent information and supports a person may need when a job coach fades. It’s also critically important that job developers do not promise employers that job coaches will be perpetually present as an incentive to hire.

Some agencies have used a ***dispersed cluster approach*** to provide staff support to workers with disabilities who require intermittent longer term supports. In this approach, several individuals who work in geographical proximity to each other either within a large business or a couple of adjacent businesses, may be supported by a single job coach who moves among them. Such arrangements must be carefully considered to ensure that the jobs obtained are the appropriate matches for the job seekers and that they are not simply placed in jobs for agency convenience. It is also important to ensure that individuals do not work side by side but are dispersed throughout the businesses to avoid

stigmatization. Finally, the workers in the cluster must be able to work independently or with support from natural supports, at least for some periods of time.

*Does that mean that management and administrative positions should be reviewed also?*

Yes. As agencies increasingly move to competitive integrated employment, management responsibilities are impacted as much as those of direct support professionals. All management positions should be evaluated for relevance to the new direction, including qualifications and training for management positions that will continue in and beyond transformation. New staff, or existing staff that have made the change to a new position, should receive training and support that will allow them to be able to self- manage. This often results in a flattening of the organizational structure through a reduction in middle managers. This should allow for some re-direction of resources to enhance direct staff professional compensation and other transformation expenses.

## Revisiting Job Descriptions

Inevitably, the jobs of many of your staff are going to change as you move toward competitive integrated employment. The focus of staff jobs and required skill sets will be different. Job descriptions must be reviewed and revised to reflect the new responsibilities and expectations. The process of revising job descriptions provides an opportunity to identify the qualities and characteristics that are most desirable in particular roles. It also allows you to thoroughly think through the tasks of the job. It is a very good practice to get the input of staff who are currently performing the job when you are developing the new job description. They know best what important skills and abilities are required, the tasks that should be included and expectations that should be communicated. Well-developed job descriptions also provide an opportunity to communicate the mission and philosophy of the agency and to weave the agency’s values throughout. An example Community Employment Specialist job description is provided at the end of this section. Keep in mind that management job descriptions should also be reviewed and revised to support transformation efforts.

## Filling Staff Positions: Recruiting, Interviewing, Orienting, Training, Evaluating, Supporting, Empowering and Retaining Staff

### Recruiting

The entire process for staff recruitment and hiring is changing as we move toward competitive integrated employment. You are looking for different qualities and characteristics in your new staff than previously. Staff are needed who have an ironclad work ethic and who are self-starters and self- managers. They need the relationship building skills to make connections with others in the community, to negotiate and compromise and to “support from behind” without overshadowing the people they support. Because of their constant interface with the public they must maintain professional behaviors and appearance. Some organizations have found that hiring new staff without experience in traditional services, who bring positive attitudes and experience working with businesses and/or in the community, helps to jump start the change efforts.

Your current recruitment efforts will likely need to change to attract the new staff that you are seeking for the future. When advertising, it is helpful to use key words and phrases that will attract people with the necessary qualities and characteristics for the job.

**Sample Job Advertisement**

Motivated self-starter with a strong work ethic, good self-direction and organizational skills and a professional appearance who likes problem solving, enjoys people and develops relationships easily, to assist job seekers with an array of interests and abilities to find suitable employment. The candidate will develop relationships with employers to address workforce needs and with job seekers to identify work interests, preferences, and skills. Preferred candidates will have experience working in the business community and with job seekers with diverse skills, abilities, and barriers to community employment.

### Interviewing

Your interviewing approach should change to focus more on surfacing the preferred qualities and characteristics for the position. While skill and experience in supporting people with disabilities is important, having the right personality and ability to make connections with others in the community is of equal or greater importance.

Sample Interview Questions:

1. Tell me about yourself. How do like to spend your time when you aren’t working?
2. What are your interests and hobbies?
3. How are you connected with your community?
4. Do you participate in any civic organizations or activities?
5. Do you enjoy meeting new people?
6. How comfortable are you speaking in public or to people you don’t know well?
7. How would you describe your personality?
8. Would you say you prefer to work more independently or with close supervision?
9. Have you ever worked in a team? Did you enjoy it?
10. Tell me about your experience with business. What did you learn?
11. Describe your experience working with job seekers? Who were they and what did you do to help them?
12. Do you believe that all people, regardless of disability, can obtain competitive integrated employment?

*Will current staff be able to transition to new positions?*

Agencies handle the transition of existing staff to new jobs in a variety of ways. Decisions about how job transitions will occur will be dependent on the needs and culture of the agency. Some agencies decide to have all existing staff apply and interview for new



To be successful, agencies must have staff who aren’t just average employees, but passionate advocates who believe people with disabilities can and should work and that they are there to help make that a reality.

employment positions. Others choose to allow staff to move into a new position without application, but

provide them with training for their new position and place them in a trial employment period for the new job. *The most important thing to keep in mind as new positions are being filled is that the new jobs cannot be done well by people who do not believe that people with complex disabilities can work.*

*If after providing training, coaching, mentoring and other support the staff is still not happy with his or her new role, what can I do?*

While we want to support as many staff as possible to make the change, realistically the new job may not be a good fit for everyone. This can be difficult for both parties, the staff and the agency. But it simply must be viewed in terms of the right job match. We would not want to make a match between a job seeker with a disability and a job that was not good for them. Neither should we want staff poorly matched to their jobs. No one benefits from a poor match. So, if a match is not there for any reason, it may be best to support the staff to find a more suitable job. Some agencies have their human resources departments work with these staff as they transition to new endeavors. HR staff can help with resume development or editing, connections with employers, providing references and counseling. Though it can feel awkward, if handled correctly these transitions can be managed artfully and won’t unduly stress the staff or their supervisor.

### Staff orientation and training

Starting off right with your new competitive integrated employment staff matters. You want to plan thoughtfully about their initial orientation and training. New staff members need to be well versed in the philosophy and values that support competitive integrated employment. Start with that foundation and build on it with training on the skills required for the job, especially if the new staff does not have those skills already. Then you can move to training on the agency’s policies and procedures. But along the way don’t neglect such important topics as customer service and teamwork. Often agencies partner new staff with more seasoned staff to shadow them and receive coaching and mentoring support.

*What are the priority areas for staff training and development?*

As noted in the section above, the philosophy, history, laws, recent funding mandates and civil rights implications that undergird competitive integrated employment are important for staff to learn about and understand. They can’t be successful in doing this important and sometimes challenging work without understanding *why* it is a priority and, hence, why their role is so important. Though they may not realize it, they are the real change agents who will advance this civil rights movement for people with disabilities. That is a big responsibility, but it should also be considered a privilege and an honor to

be among the leaders of change within this field. Staff can feel very inspired when they are supported to see their role from this perspective.

Staff will also require technical assistance and training to be proficient in delivering effective supported and customized employment services. With experience, we’ve grown more sophisticated in our knowledge of marketing, business practices and successful approaches for securing individualized jobs that match the interests and preferences of the job seeker with the needs of the employer. These strategies have improved our ability to get people with more complex disabilities into competitive integrated work, however job developers must have the proper training and support to utilize these successful practices and approaches. The training must be of good quality and highly effective. The most effective training includes not only classroom or online training but also field based mentoring by experienced staff.[19](#_bookmark146) Other important training such as customer service, systematic instruction, facilitating natural supports, utilizing assistive technology, teamwork and strategies for fading support should also be provided. Competency in these areas is particularly important for job coaches. And finally, a clear understanding of the procedures for record keeping and billing is essential for keeping your agency financially sound.

During transformation or any significant change in a business, the need for staff development arises and the demand for training increases substantially. As transformation plans and budgets to support them are developed, consideration must be given to the need and cost for increased staff training.

Trainings and certifications are available to help you ensure that staff have the competencies they need to advance your employment first agenda and outcomes.

* ODEP has a free subscription service open to all that provides topical webinars from experts in the field monthly. Webinars are archived and accessible to the public. To go to archived webinars, see the LEAD Center <http://www.leadcenter.org/customized-employment>
* Association for Community Rehabilitation Educators – You can go to their website [www.acreducators.org](http://www.acreducators.org/) to locate trainings that provide competency-based certification. These trainings can also prepare staff to sit for the APSE exam to become a certified employment support professional (CESP).
* University based trainings – Check universities in your area or nearby states for trainings. The federal government funds several regional training and resource centers. For a list of these centers, go to: <https://acl.gov/Programs/NIDILRR/Grant-Funding/Programs/rrtc/resources.aspx>
* Griffin Hammis Associates: <http://www.griffinhammis.com/>
* Marc Gold and Associates: [www.marcgold.com](http://www.marcgold.com/)
* TransCen: <http://www.transcen.org/>
* Virginia Commonwealth University: [www.worksupport.com/training/courses.cfm](http://www.worksupport.com/training/courses.cfm)
* College of Employment Services: [www.directcourseonline.com](http://www.directcourseonline.com/)
* TRN: <https://disabilitywebtraining.com/>

19 <http://nirn.fpg.unc.edu/learn-implementation/implementation-drivers/coaching>

*How can I get quicker access to face to face training for staff?*

Employees need access to quality training to gain and expand their skill sets and do excellent work. Agencies are often challenged to find the resources necessary to get training for staff in a timely manner. Though there are increasingly more online options for training, there is always a need for direct, face to face training and mentoring. This type of training is especially important for staff as they are called upon to perform some of the more complex strategies used to support people with disabilities in finding, obtaining and maintaining competitive integrated work. Access to external training through attendance at training sessions, conferences and workshops is important. But those opportunities do not always present themselves in the timeframes in which they are needed by staff. It is optimal to have access to online training resources offered by ODEP and some others entities that are listed above and staff within the agency who are trained as trainers in the key areas in which staff need training. Sharing training resources with other agencies is a good strategy as well. Agencies that have staff that are trainers may be willing to share that training resource, perhaps in trade for other training resources that the receiving agency may have. Agencies may also come together to purchase training for their staff.

Some examples of this kind of cooperation are below:

Development of an employment roundtable attended by representatives of four northwest Iowa supported employment providers was spearheaded by ISI in Battle Creek, Iowa. The providers, ISI, Genesis, the Howard Center, and Cherokee Work Services, get together on a quarterly basis to train, share experiences and support each other. They recently invited two additional supported employment providers in their region to attend. Staff in attendance receive CEUs for participation. Their regional DD office coordinated with a state grant from the Iowa Coalition for Community Employment (ICIE) to provide two trainers at no cost to the group to work specifically on customized employment techniques.

In January 2015, five supported employment providers in Maryland, SEEC, Compass, the Arc of Howard County, the Arc of Central Chesapeake and the Spring Dell Center, collaborated to provide staff intensive training and credentialing on Discovery, Job Development and Systematic Instruction. The “Discovery Consortium”, as it became known, was funded through a grant from the Kessler Foundation.

### Evaluating staff performance

*What are some good strategies for evaluation of staff performance?*

Training needs to be conducted to help employees learn how to successfully perform their jobs. They also need feedback on how well they are performing so they have an opportunity to improve their skills. There are many ways to provide that feedback. One approach is to observe staff as they perform their jobs to determine how well they can use the skills that they should have acquired through training. This approach makes the evaluation less personal because it is focused more on how well the training was absorbed and translated into action. If the staff member is not performing well on tasks they were trained on, then the next step is to provide additional training or other support to help the staff gain the skill they are lacking.

See also Module 7 discussion on 360-degree staff evaluations.

### Supporting staff

We have staff who are predominantly in the field and rarely at the office. How do I prepare them for this decentralization of services?

Staff who support people to work in competitive integrated employment are often primarily, if not entirely, located in the community. They may not have a permanent desk at the agency’s office but instead have a desk or cubicle that they share with other employment staff. Many employment staff base themselves entirely in the community - in their car or at the local coffee shop. This has become increasingly possible as we have gained access to more portable electronic means of communicating and record keeping. These tools should be used to keep you connected to staff and to provide them assurance that assistance from management is always there if they need it. It is important to consider some type of remuneration for staff using their own electronic devices like cell phones or tablets if they are required to have and use them.

As mentioned earlier, these staff will work fairly autonomously in the community and therefore should have strong self-management skills. That does not mean that they do not need support, however.

Agencies should be thoughtful in preparing staff for the impact of decentralization which can include some sense of isolation. Some ideas for how to help staff feel supported and a part of the agency are:

* Develop a routine of visiting staff in the community. Be sure to do this in a way that does not interfere or in any way stigmatize the person being supported at work. Staff appreciate having you see and understand what their job entails daily.
* When visiting, ask the staff what you can do to assist them in doing their job. If they give you some ideas, don’t forget to carry through with their requests and communicate back to them.
* Schedule routine staff meetings in the community, not back at the agency’s office. This reinforces the idea that the community is where our work is and shows staff that management will come to them to provide support rather than always expecting them to come to management. These meetings also provide opportunities for employment staff to share successes and challenges with each other and promote team support and problem solving.
* Develop ways to reward staff for success, e.g., newsletter features, public acknowledgement at events, recognition as employee of the month, and monetary rewards for superior performance.

### Empowering staff on the front lines

*Sounds like staff are going to be much more independent. How do I know they will make good decisions?*

Staff in decentralized organizational structures can and should be empowered to work semi- autonomously. They can often be in a position where they must decide how to address a particular situation quickly. They don’t always have immediate access to supervisors and therefore need to have the trust and support of their team and their supervisor to act using their best judgment. It should not be taken for granted, however, that the staff automatically have the skill and the confidence to assume this responsibility. Judgment and decision-making are acquired skills. Training should be provided that prepares staff for the responsibility they will have and provides them with guidance on strategies for sound decision-making. The parameters of staff decision-making authority should be well defined so that everyone is clear about what kinds of decisions can and should be made autonomously by staff verses those which require input by other team members or supervisors.

### Staff retention

*How can I keep my staff when I really don’t have resources to pay them as much as I think they deserve?*

Staff retention is always important in any organization. Companies spend large sums of money, time and effort on staff recruitment and training. When turnover occurs, it is very costly not just in terms of finance and effort but also in terms of consistency and quality. Agencies need to do everything possible to support and retain staff. Often wages are a concern and unfortunately one of the hardest variables to influence. There are some ways to re-allocate funds to improve staff salaries, such as administrative efficiencies, reductions in operating costs and management flattening, but these efforts alone may not completely address the problem. There are other strategies that should be considered that can help retain your staff such as:

* Leadership training and career advancement - Staff who are interested in career development should be groomed for future advancement within the agency and provided opportunities to apply for promotions. Part of the preparation for advancement is to provide opportunities for staff at any level in the agency to develop and exercise leadership skills. This kind of preparation may take many forms, like rotating facilitation of staff meetings among team members, encouraging staff to provide training and mentorship to others, supporting participation on a special project, serving as a team leader, or enrolling them in formal leadership training. Good managers identify the skills that their staff need to be able to potentially advance in the agency through the annual evaluation process and ensure that opportunities to acquire those skills are provided.
* Celebrating successes – Transformation is hard work. Finding great jobs for people with complex barriers to employment is also hard work. Your agency will benefit from developing strategies to celebrate what you have achieved through the tough work you and your staff have done. Stories of success in competitive integrated employment can accomplish many objectives. They can demonstrate to those who may have been doubtful that people with complex barriers to

employment can not only work but be successful beyond their imagination. They can also reward the workers with disabilities by acknowledging what they have achieved. They can reward the staff who have been an essential part of the employment success story. Data can also be used to demonstrate and celebrate success in fun ways. Use your teams to brainstorm how you’ll recognize and celebrate success, such as the one below.

At each team meeting, the staff of Goodwill of South East Wisconsin lists out all the people who recently got jobs and where they are now working. They take the time at the front end of the meeting to congratulate each other in person on the individuals hired for that month. Throughout the month, they also feature success stories highlighting individuals who have gotten jobs to showcase the individual, employer and the SE team members who have helped make it happen.

## Team Building and Self-Directed Teams

*How do we develop effective teams?*

Teamwork is essential in successful competitive integrated employment services. Everything about community employment is constantly in motion. Opportunities can arise that must be taken advantage of immediately. Schedules can change unpredictably and staff must be flexible and cooperative with each other. Employees should have a strong orientation towards customer service which means that when support is needed by either of their two main customers -- the worker with a disability or the employer -- the entire team works together as necessary to ensure that the appropriate support is provided. Teams will be developed using several considerations. Some teams are developed based on geography. This is particularly true in decentralized, geographically dispersed agencies. There are other organizing principals to consider depending on the purpose and focus of the team: like who works well together, who has a specific area of expertise, and who either excels in an area or requires additional support and mentoring.

Many agencies use self-directed teams to manage their services. Self-directed or self-managed teams are groups of staff who use their collective skill and knowledge to manage their area of responsibility within their company without the traditional amount of managerial support. Members of the team should have the skills to do their jobs independently and a willingness to coordinate and cooperate with others. Managerial support is more of a coaching nature rather than the traditional, hierarchical approach.

That sounds a little scary. How will I prepare staff to participate in self-directed teams?

Self-directed teams require thoughtful preparation and adequate management support to function optimally. There must be a significant amount of trust among the members of the team and between the team and the manager. Preparation for participation in a self-directed team should include the following training:

* Team mission and vison
* Concept and functioning of self-directed teams
* Roles and responsibilities of team members and managers
* Consensus building and conflict management
* Data-based team performance measurement
* Team member evaluation and feedback

The agency must also ensure that teams have the following support from management:

* Clear expectations
* Access to all needed information and resources
* Tolerance for mistakes
* Trust and guidance as needed

When properly developed and appropriately supported, self-directed teams can be very effective. Participation in the team can glean greater staff satisfaction and commitment to their work. That satisfaction can translate into better performance by the individuals on the team and by the team collectively. Self-directed teams are usually closer to the direct work of the agency and can identify and address issues more quickly and sometimes more innovatively than managers who may be more removed.

## Attachment to Module 6

#### XXXX AGENCY JOB DESCRIPTION:

***Mission****: Advancing community support and opportunities for people living with disabilities*

***Core Values:*** *We believe each person should:*

* + *Be included, respected, and valued;*
  + *Have ongoing information, experiences, and expectations from which to make choices;*
  + *Have a variety of relationships;*
  + *Live and participate in the communities of their choice; and*
  + *Have a career, dreams for the future, and make meaningful contributions.*

#### JOB TITLE: Employment Specialist Grade: 5

#### FLSA: Exempt

#### Revised: XXXX SUPERVISED BY: XXXX

**Job Summary:** Works with assigned individuals, staff and circles of support to identify the job seekers interests, skills, talents and possible support needs to facilitate community integrated employment. Works with community employers to gain an understanding of the overall functioning and personnel needs of their businesses. Makes sound matches between the work aspirations and skills of people supported and the personnel needs of employers which result in satisfactory outcomes for both parties. Develops and maintains positive relationships with people supported, colleagues, referring agencies and with employers.

#### Essential Functions:

1. Collaborate with the individual job seeker, agency staff and others, as appropriate, to develop an employment profile using Discovery and other approved techniques to ascertain as much information as possible to facilitate a sound job match;
2. Ensure that the information gathered during the Discovery process is kept up to date, focuses on the interests and skills of the job seeker, is framed positively, highlights the talents of the individual, recognizes the support needs the person may have, includes both the individuals desired outcomes as well as his or her “non-negotiables” for employment and is conducted in community settings;
3. Conduct informational interviews with community employers to develop relationships and learn more about their businesses;
4. Actively participate in community business association networking and other functions;
5. Use personal informal networks and those of others to identify community jobs;
6. Develop and maintain positive relationships with community employers and referral sources;
7. Ensure that necessary information regarding jobs opportunities is communicated to the individual, his or her family or others providing support to the individual;
8. Ensure that information regarding the impact of employment on the individual’s benefits is accurate, communicated to the individual and, where appropriate, his or her family or residential provider and kept up to date;
9. Conduct analyses for jobs obtained to ensure that the individual working and staff providing support understand exactly what tasks need to be accomplished and in what order;
10. Support employers and co-workers to orient and train the worker with a disability with his or her support, develop natural supports for the individual in the work site and begin planning for fading of employment specialist’s direct support as soon as possible;
11. Coordinate activities with other staff and demonstrate ability to function as a member of the team;
12. Maintain data on all activities and develop reports that will allow for an assessment of progress and examination of problem areas when they occur;
13. Complete all paperwork, including billing documentation, as assigned and in a timely and professional manner;
14. Participate in the orientation and training of other agency staff as requested;
15. Attend and participate in all relevant agency events, workshops, training and meetings; and
16. Perform other job related duties as assigned.

#### Required Knowledge, Skills, and Abilities:

1. Ability to gain thorough knowledge of XXXX agency’s policies and procedures;
2. Ability to act as a positive representative of XXXX agency to the public;
3. Thorough knowledge of discovery, customized employment, traditional job development and job analysis practices and procedures or willingness and ability to acquire such knowledge
4. Ability to effectively communicate with individuals from diverse backgrounds;
5. Ability to develop and maintain community relationships for the benefit of the agency and people served;
6. Ability to research, prepare, review and maintain reports and documents;
7. Ability to maintain confidentiality;
8. Ability to use sound judgment when making decisions;
9. Ability to pass a criminal background check; and
10. Skilled in the operation of relevant computer systems, including hardware and software, and office machines.

#### Education and Experience:

1. B.A./B.S. in Vocational Rehabilitation, Education, Special Education, or related field required or equivalent training and experience;
2. CESP certification required or must be acquired within one year of initiation of employment;
3. Requires two or more years related experience working with persons with disabilities;
4. Must meet XXXX agency and funding jurisdiction current requirements for criminal background/records check;
5. Valid health certificate to meet current funding jurisdiction requirements; and
6. Valid state-issued driver’s license with current driving record in good standing required.

#### Physical and Environmental Conditions:

Work requires no unusual demand for physical effort.

Work environment involves risks or discomforts that require special safety precautions e.g. safely operating a motor vehicle.

*The above job description is not intended as, nor should it be construed as, exhaustive of all responsibilities, skills, efforts, or working conditions associated with this job.*

*Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of this job.*

# Conclusion

This manual reflects best practices that have been developed over the course of the past 40 years, with an emphasis on the most up-to-date and effective practices that are relevant in today’ environment where we see a tremendous acceleration toward competitive integrated employment and inclusive community supports. The manual is a synthesis of the knowledge and experience that the authors, their colleagues and numerous provider organizations across the country have gained in transforming organizations, and the public systems that fund them, so that individuals with disabilities, including those with complex support needs, can get and keep competitive integrated employment in their communities.

Clearly, there is no one way for organizations to implement a transformational change process, but we hope that the practices described in this manual – practices that are considered “tried and true” among those who make this topic their life’s work – will assist you in your efforts. Be sure to tap the many resources cited in this document, as well as experts and mentors who can provide guidance on your journey.

We urge you to advocate for and enact positive change with a sense of urgency. Be part of the exciting Employment First movement that is underway toward true systems change and full lives in the community for all individuals with disabilities. As Margaret Mead said, “Never believe that a few caring people can’t change the world. For, indeed, that’s all who ever have.”