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Customized Employment Employers and Workers: Creating a Competitive Edge

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Customized Employment Employers and Workers: Creating a Competitive Edge

Abstract
[Excerpt] 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 the 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 that lays the foundation for employment planning. Planning results in a blueprint for the job search, during which an employment relationship is negotiated to meet the needs of both the job seeker and the employer.

Keywords
customized employment, disability, public policy, workforce

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Customized Employment Employers and Workers: Creating a Competitive Edge

Summary Report on Customized Employment Grants and Workforce Action Grants

July 2007

Funded by the U.S. Department of Labor, Office of Disability Employment Policy

Prepared by the National Center on Workforce and Disability/Adult

ODEP
Office of Disability Employment Policy

National Center on Workforce and Disability/Adult
NCWD

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Report Organization

Customized Employment strategies offer new processes to advance employment opportunities for individuals with disabilities. The Office of Disability Employment Policy, U.S. Department of Labor initiated a series of demonstration projects to identify policy issues that support the use of Customized Employment strategies in the workforce development system. The purpose of this report is to summarize the lessons learned from this demonstration initiative and the policy recommendations it has generated.

Information for this report has been developed based on the technical assistance provided by staff of the National Center for Workforce and Disability/Adult. Technical assistance staff worked directly with grantees in the design and implementation of their projects, and helped them to identify lessons learned.

This report is organized in the following manner:

Executive Summary

I. Background on the Demonstration Projects and Grant Initiatives
II. Recommendations
III. Development of Partnerships and Collaborations
IV. Experiences with Integrating Service Delivery Strategies Within the Workforce Development System
V. Experiences with Leveraging Resources for Common Goals
VI. Policy and Systemic Influence
VII. Sustainability of Grant Activities

Section I provides information and background on the demonstration projects and grant initiatives embarked by ODEP starting in 2001.

Section II summarizes local, state and federal recommendations generated as a result of this demonstration initiative. A key purpose of this initiative was the identification of policy issues and strategies to consider in order to address and ensure that individuals with disabilities can access and succeed within the One-Stop Career Centers, and achieve positive employment outcomes by using Customized Employment strategies. The sections that follow provide greater detail on the challenges and strategies experienced by the sites that contributed to the development of these recommendations.

In sections III to VII, information gathered from grantees' experiences is presented in a consistent outline.

- Key findings and successful strategies—bulleted examples of grantee activities that have contributed to projects' understanding of each issue
- Overcoming obstacles—some of the challenges grantees experienced and the strategies they have used to address them
- Discussion—the integration of findings across all of the grantees

Within the body of the report, individual grantees are identified by the city and state where the grantee is based (with the exception of Alabama, Montana, and Alaska, which were statewide initiatives). Examples from grantees are used for illustrative purposes.

CUSTOMIZED EMPLOYMENT STRATEGIES
Executive Summary

Office of Disability Employment Policy

The Office of Disability Employment Policy (ODEP) provides national leadership by developing and influencing disability-related employment policy and practice affecting the employment of people with disabilities.

To identify policy issues and effective practices, a series of demonstration projects was awarded from 2001-2003, resulting in a total of 20 Customized Employment and six Workforce Action grants. In conjunction with the Department of Housing and Urban Development, ODEP also awarded five demonstration projects to serve individuals who are chronically homeless.

The initiative factored in the following assumptions:

- What we have learned from the best of disability employment practices over the last 20 years will benefit people with other complex barriers to employment.
- Demonstrating the effectiveness of customized strategies through the generic workforce system will increase employment for all people with complex needs.
- Building capacity within the generic workforce system to customize employment for people with complex barriers will require multiple changes across traditional and nontraditional systems.

Customized Employment

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 the 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 that lays the foundation for employment planning. Planning results in a blueprint for the job search, during which an employment relationship is negotiated to meet the needs of both the job seeker and the employer.

Job Seeker Exploration/Discovery

Time spent engaging with the job seeker to explore their unique needs, abilities, interests, and complexities is essential to establishing successful employment. Unlike traditional testing or standardized assessment, Customized Employment allows the job seeker to control the exploration process, and captures information on their preferences, personal networks 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 connections to potential 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/discovery 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 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, or agreement, 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.

Benefits of Customized Employment

For individuals:

- Customized Employment produces high-quality employment with increased wages, benefits, and integration into the community for people with disabilities who were previously considered unemployable by some systems.
- Customized Employment can reduce reliance on public benefits.
- Using Customized Employment strategies can result in employment for other groups of people considered "hard to serve" by the workforce system.

For the system:

- The integrated Customized Employment model increases efficiency through new partnerships and funding sources.
- Using Universal Strategies that are relevant to all job seekers versus specialized services for individuals with disabilities can change the way that employment systems are organized and operated—for both customers with disabilities and those with other barriers to employment. This produces more effective services and outcomes.
- Leadership personnel, at all levels, are critical change agents for increasing employment for people with disabilities.

For employers:

- Using Customized Employment strategies can assist employers to retain valuable staff.
- Customized Employment offers a targeted approach to matching skill sets with a business need.
- The use of Customized Employment strategies can assist employers to address specific conditions within their businesses that require attention.

Systems Change Results

Throughout this ODEP-funded initiative, a total of 26 Customized Employment and Workforce Action grantees were funded for periods of time ranging from three to five years. In addition to demonstrating service provision to individuals with disabilities using Customized Employment, these projects were charged with operating as part of the workforce system and demonstrating systems change in services to individuals with disabilities, including in One Stop Career Centers operated under the Workforce Investment Act (WIA). The following are key lessons learned through this demonstration effort.

Partnerships and Collaboration

- Partnership development requires investment. Whether establishing new relationships or building on preexisting ones, projects recognized that meaningful partnerships were formed only through investing the time to understand each other's systems, language/definitions, and the parameters under which they operate. When working within groups, projects often established ground rules to create a non-threatening environment and to ensure that the problems encountered were viewed as problems of the team or system rather than problems of individual partners or personnel. Together, partners identified clear visions and common goals, and developed team trust and cohesiveness.

- To promote mutual understanding and systematize service delivery arrangements, including braided funding, projects produced various forms of clear collaborative agreements—formal and informal—that recognized common objectives and interdependent roles and responsibilities. Letters of Understanding, Memoranda of Understanding, and Purchase of Service Agreements were established with various entities [e.g., mental health organizations, Vocational Rehabilitation (VR), community rehabilitation providers (CRPs), school systems] as mechanisms to formalize these partnership arrangements.

- Although collaborative service delivery is an effective way to demonstrate new ways of conducting business and promote systems change, multilevel partnerships were necessary to bring efforts to a broader level. Eliciting local, state, and federal support enhanced the workforce system's ability to serve their customers with disabilities. Identifying a "champion" at both the Local Workforce Investment Board (LWIB) and state agency levels at the onset of project planning played an important role in the overall impact of projects. Often this was achieved by building on previously existing local and state relationships and initiatives.

- Effective utilization of partners was the cornerstone of their ongoing investment and engagement. Those projects that clearly defined the roles and tasks of partners as activities evolved were successful in maintaining continued commitment. Various strategies were effective in utilizing expertise over the long term, including sustainability planning teams; customized support teams; disability advisory councils as Workforce Investment Board (WIB) subcommittees; and business advisory committees. Teams and

subcommittees maintained a clearly articulated vision and objectives that were very outcome-oriented.

- No single partner or source of funds can adequately respond to the potential spectrum of needs of job seekers with complex barriers to employment. Limited partner resources necessitate collaborative service delivery. Furthermore, the additional up-front exploration, planning, and job development time needed for quality Customized Employment may act as a disincentive for One-Stop partner staff to provide services as opposed to deferring customers to alternate agencies such as the public VR system. Effective leveraging of resources was realized by establishing coordinated service delivery teams, joint person-centered planning teams, and collaborative case consultation among partners. In this way the additional time and resources required to effectively implement a customized solution were shared across multiple partners.

- Sharing successes can spark interest. Sharing lessons learned—negative as well as positive—helped promote understanding among partners and built credibility. Helping partners to recognize their accomplishments and creating opportunities to recognize or reward partners resulted in their continued engagement. Case studies of specific customers were an effective way to illustrate the significance of systems/policy change and get others' attention and investment. Additionally, multimodal dissemination of these successes—whether in the form of individual case studies or aggregate outcome data—was critical for informing and engaging partners at all levels.

Service Integration

- To encourage "seamlessness" between systems, many One-Stop Centers adopted shared intake forms that could be used across multiple partners. This increased the ease of information sharing and reduced the individual's burden reapplying to another system should they require its services.

- Some One-Stops established "Intensive Service Unit Partnerships" or similar entities meant to provide assistance to individuals who have difficulty accessing the standard, generic "core" services. The means to effectively identify these customers before their frustration forced them out of the One-Stop system was essential to providing more intensive services and supports.

- Sites observed the need for a strong case management element in services offered to individuals with complex barriers. Furthermore, projects realized that offering effective employment services meant coordinating with providers of various life and employment support services such as transportation, housing, and personal support.

- Many sites employed some variant of a customized support team: a group of multiple partners, led by the individual job seeker, who all jointly took some responsibility for the individual's needs. Although this was time-consuming, it typically resulted in success for individuals whose needs could not be met as well by a single agency.

- To provide complex or time-consuming services, some sites built capacity in community providers through training, mentoring, and collaborative efforts. Effective coordination with these community organizations gave One-Stops a vehicle to provide Customized Employment services. Typically, these collaborative arrangements also included secondary funding sources such as VR, Medicaid, or the state developmental disabilities or mental health systems.

Leveraging Resources

- Partnership was the basis of all multi-source funding agreements. The ability to access and employ multiple funding streams required knowledge of the various systems involved and their funding priorities. Furthermore, a system's willingness to commit funding to a creative endeavor depended on its knowledge of and trust in the various stakeholders. Formal agreements such as Memoranda of Understanding made resource sharing easier.

- Funding could be braided on either a systemic or individual level. Systemic resource sharing could occur in jointly managed projects and shared staff positions. Funds braided for an individual required eligibility be met for support through each of the various funding streams. This type of braiding could often be time-consuming and require considerable case management but also created some of the most innovative Customized Employment and entrepreneurial successes nationwide.

- In most cases, a small but entirely flexible allotment of seed money encouraged other systems to commit to braided funding ventures. In instances where flexible grant dollars were available and could be accessed quickly for a wide variety of purposes, other systems were typically more willing to contribute further funding towards the same goal. States showed conclusively that this allotment need not be large (often less than $1000), but it had to be dictated by the individual's employment plan and accessible with very little delay. Without grant funding or other similarly flexible funding streams, most sites struggled to find a similarly flexible and customer-directed allotment.

- Resource acquisition[1] was shown to be a particularly potent use of flexible funding. Though the practice had previously been used primarily for entrepreneurial goals (e.g., to purchase equipment for businesses) it also became applicable to individuals seeking standard employment. In many career paths, possessing relevant tools or equipment makes an employee a more valuable asset to a company (e.g., an individual who purchased a rig for rebuilding engines was able to set up this side business within an existing garage). As such, resource acquisition was an empowering practice for the job seeker.

- Customer-driven funding choices require a customer-driven system. In instances where a system or organization was acculturated towards a person-directed service philosophy—one where the individual's goals and priorities had primacy in the decision-making process—funding choices were more creative and customer-driven. For example, a

[1] Resource acquisition occurs when funds are used to purchase equipment or tools on behalf of a jobseeker.

community service organization in Georgia had not previously experimented with flexible funding, resource ownership, or the other major aspects of customer-driven funding until it began a major overhaul of its own operating principles. Having engaged in the internal changes that shifted the locus of choice from staff to jobseeker, the capacity to offer customer-directed funding options quickly followed.

Policy and Systemic Influence

- Local systems had considerable control and flexibility about service provision, and grantees worked with LWIBs regarding how to exercise it effectively to serve people with disabilities. Many sites were able to negotiate more flexible joint service provision and funding with mandated partners than occurred in other parts of their state. A range of entities participated in this joint service provision, including: VR; WIA; Veterans; community mental health; Social Security Benefits Planning, Assistance, and Outreach[2] (hereinafter referred to as BPAO/WIPA) counselors community providers; and Centers for Independent Living. The capacity to demonstrate success with some of the One-Stops' most challenging customers created an openness and flexibility on the part of the LWIB and partners (mandated and non-mandated) to develop policies that could be applied more broadly.

- To create systemic change beyond the funding cycle of the grant, sites integrated expectations concerning the provision of Customized Employment strategies into their Requests for Proposals when selecting One-Stop operator and/or training vendors. By standardizing these practices, the WIB communicated that serving individuals with disabilities was a priority and set standards for those services.

- Several sites established local standards for performance and service provision to individuals with disabilities. One LWIB set a benchmark percentage of individuals with disabilities that needed to be served through the One-Stop and developed sanctions if the operator did not meet those standards. Another LWIB created a point system for preferred employment outcomes, attaching values to different types of job orders and job seekers through an "Investment Grid." High point values were attached to customers who had received the most support. Placing a job seeker from a special population (e.g., an individual with a disability) into a job with a priority status (e.g., health care or information technology) received the highest point value.

- Sites influenced both local and state levels to address policy barriers and practices. This was particularly effective in the area of funding Customized Employment services. Several sites worked with their state Medicaid authority to access Medicaid funding for services to support employment. In several states, the expectation of employment as a primary service available to individuals with disabilities was integrated into state policy through the departments of Developmental Disabilities and Mental Health. VR payment

[2] In May 2006, due to an increased emphasis on work incentives, return to work supports and jobs for beneficiaries, the Benefits Planning Assistance and Outreach (BPAO) Program was renamed the Work Incentives Planning and Assistance (WIPA) Program. It became effective September 30 with awards to 99 WIPA projects in 49 States.

processes were also adapted to allow payment for discovery services and supported self-employment.

- All sites provided training opportunities for staff, including in-person options, distance education, and mentoring. To ensure that staff integrated this information into their work performance, several sites built expectations concerning staff competencies in serving customers with disabilities into their annual reviews.

Sustainability

- Grantees found that developing staff competencies and maintaining an effective professional development system was a key feature of sustainability. Strategies for ongoing professional development ranged from creating modules for online training to infusing Customized Employment practices into existing statewide training curricula. Overall, projects recognized that investing time and effort in professional development was a must for staff to gain competence in meeting the employment needs of multiple customer populations with barriers to employment.

- As additional partnerships were formed and innovative service delivery systems established, grantees entered into more formal contractual agreements to sustain collaborative efforts beyond the grant period. Letters of Understanding were developed ensure that partners were committed to continuing to support job seekers with barriers to employment; One-Stop operator contracts were modified to reflect customized service delivery; and Requests for Proposals (RFPs) included accountability measures for quality assurance.

- The demonstration activities of the grantees served as a laboratory to identify and address local and state policy concerns. By demonstrating effective strategies to improve employment outcomes for individuals with disabilities, sites could move the employment agenda forward through various systems, including state workforce development, mental retardation, and Medicaid.

- Workforce development systems have often struggled with helping customers with various abilities, learning styles, and barriers to benefit from the programs and services available at and through One-Stops. By applying the principles and concepts of universal design to workforce systems, many grantees promoted ease of use and meaningful access to employment services and opportunities.

- The mosaic of human services includes pilot programs that often are not sustained beyond the funding period. The grantees' projects addressed sustainability through every phase, from planning to implementation. They developed sustainability think tanks, strategic planning teams, and WIB disability subcommittees as organizational strategies to ensure longstanding systems change.

CUSTOMIZED EMPLOYMENT STRATEGIES:
Employers and Workers
Creating a Competitive Edge

I. Background on the Demonstration Projects and Grant Initiatives

Customized Employment offers new strategies to increase employment opportunities for individuals with disabilities. The concept of Customized Employment builds on elements of supported employment, with a focus on individualization and negotiation to address the needs of both the job seeker and employer. While originally applied with individuals with disabilities, the strategies are universal and will benefit many individuals with barriers to employment. To better understand the process of Customized Employment and its use within the generic workforce development system, the Office of Disability Employment Policy embarked on a demonstration initiative in 2001.

The Office of Disability Employment Policy

The Office of Disability Employment Policy (ODEP) was authorized by Congress in the Department of Labor's FY 2001 appropriation. Recognizing the need for a national policy agency to ensure that people with disabilities were fully integrated into the 21st-century workforce, Secretary of Labor Elaine L. Chao delegated authority and assigned responsibility to the Assistant Secretary for Disability Employment Policy. ODEP is a sub-cabinet-level policy agency in the Department of Labor.

With the ultimate goal of increasing the number of people with disabilities who work, either as employees or entrepreneurs, ODEP provides policy analysis, technical assistance, innovative practice and strategy development, and education and outreach to employers, employees, and the disability community. ODEP also funds a variety of employment-related initiatives related to these efforts.

ODEP is the only federal agency that deals solely with disability employment policy. Two specific expectations of ODEP are:

- Increase the capacity of the service delivery system to serve job seekers with disabilities.
- Increase planning and coordination within the service delivery systems for job seekers with disabilities.

ODEP does not regulate other federal or state agencies, and it does not provide services to job seekers with disabilities. The agency works collaboratively with other federal, state, and local systems to identify, develop and enhance the employment outcomes for people with disabilities within the service system to improve disability employment policy. Examples of ODEP's work include:

- Conducting research on the ways in which current policy affects the inclusion of people with disabilities into the workforce.
- Developing projects to support systems change within current employment policy and practice.

- Recommending changes in Department of Labor policy that will allow people with disabilities to become fully integrated into the workforce.

ODEP has implemented several demonstration projects to develop innovative programs and provide technical assistance to improve employment outcomes for adults and youth with disabilities. These projects were expected to:

- Increase the *capacity* of service delivery systems.
- Increase *planning* and *coordination* within and across service delivery systems.
- Increase *employment outcomes* resulting from customized strategies.

ODEP took the following assumptions as the basis for the initiative:

- What we have learned from the best of disability employment over the last 20 years will benefit people with other complex barriers to employment.
- Demonstrating the effectiveness of customized strategies through the generic workforce system will potentially increase employment for other people with complex needs.
- Building capacity within the generic workforce system to customize employment for people with complex barriers to employment will require multiple changes across traditional and nontraditional systems.

The first Solicitation for Grant Applications for these demonstration projects occurred in 2001. From 2001 to 2003, ODEP awarded 20 Customized Employment grants and six Olmstead WorkFORCE Action Grants. Although the Customized Employment and Olmstead grants had similar goals, they targeted different needs within the workforce development system. The following section summarizes the goal and the funds available under each grant.

Grant Programs

Customized Employment Grant Initiative

The Customized Employment grant initiative aimed to increase the capacity of One-Stop Career Centers to provide seamless and quality employment services for people with significant disabilities, resulting in competitive jobs that pay at least minimum wage and offer opportunities for career advancement. To that end, each grantee worked to infuse Customized Employment services[3] into the local One-Stop delivery system. As the grant recipients, LWIBs received funds to build the capacity of local One-Stop Centers to provide Customized Employment services to persons with disabilities who were not regularly targeted for services by the One-Stop delivery system. Grants funded under this program provided a vehicle for LWIBs to systemically review their policies and practices around disability, and to incorporate new and innovative practices to improve integrated employment outcomes.

[3] Customized Employment services may include strategies such as job carving, self-employment, supported employment, job restructuring, providing natural supports, and other negotiated job development strategies that are individually determined and customized to the individual and the employer.

The Customized Employment grant initiative was initially funded by ODEP in FY 01 and continued in FY 02 and 03. Funding for FY 01 and FY 02 was $3.5 million; funding for FY 03 was $2.5 million, with individual grants ranging from approximately $500,000 to $750,000.

Each grant was awarded for a one-year period with the opportunity to renew funding for up to four additional years. Eight grants were awarded in FY 01, and they continued for five years. Eight additional projects were funded in FY 02 for four years, and five grants were awarded in FY 03 for three years.

Workforce Action Grant Initiative

The Working for Freedom, Opportunity, and Real Choice Through Community Employment (WorkFORCE) Action grant initiative continued ODEP's development and documentation of programs that enable participation in community employment through customized strategies. The goal of the grant program was to support local nonprofit organizations to demonstrate Customized Employment strategies for persons with disabilities covered by the Olmstead Supreme Court decision of 1999 (Olmstead v. L.C., 527 U.S. 581, 119 S. Ct. 2176-1999). The target groups to be served were people with disabilities who were either unemployed or underemployed and who were:

- In non-work, segregated work, or transitioning to work settings;
- Covered under the Olmstead decision and/or Executive Order; and therefore part of the state's overall Olmstead planning process; or
- Awaiting employment service and supports following a move from a residential facility, or part of a plan to move into the community under the Supreme Court's decision in Olmstead and/or Olmstead Executive Order.

These grants were awarded to community providers who then partnered with their workforce development system and LWIB. The first WorkFORCE Action Grants were awarded in FY 02, with three grants funded for a total of $1.7 million for four years. An additional three grants were awarded in FY 03, which were funded for three years.

The National Center on Workforce and Disability/Adult

The Institute for Community Inclusion was awarded an additional ODEP grant as the central coordinator of the National Center on Workforce and Disability/Adult (NCWD/A). NCWD/A functioned as a training provider for the One-Stop system. It provided training, technical assistance, policy analysis, and information to improve access for people with disabilities in the workforce development system and to assist Customized Employment grant initiatives and Olmstead WorkFORCE Action grantees to meet their project goals.

Grantee Descriptions

Great variation existed among grantees with regard to service delivery areas, primary implementers, project goals, and implementation methods. Each project designed its program to reflect the idiosyncrasies of the area and operations. Grantees generally organized their projects in one of three ways:

1) Project activities and service provision stayed primarily with One-Stop staff and management.
2) Activities were based primarily within the One-Stop, while a disability provider, CRP, or other entity was responsible for implementing the individual services.
3) Project activities were primarily based externally at a CRP.

Each method of implementation met with its own set of strengths and challenges, some of which are highlighted in the section on Partnerships. Worthy to note is that the project design often lent itself to the focal area that projects held and their success—or lack thereof—in achieving systems change.

See Appendix A for descriptions of individual grantees.

II. Recommendations

A primary purpose of this demonstration effort was to identify policy issues that need to be addressed to ensure that individuals with disabilities can access and succeed within the One-Stop Career Centers, and achieve positive employment outcomes by using Customized Employment strategies. This section identifies a variety of recommendations that need to be considered at the local, state, and federal levels. Recommendations are grouped in categories matching the report sections. Overall issues from each report section have been briefly summarized below to provide context.

Overall Issues

Partnership and Collaboration

Collaboration was the primary innovation of most of the grant sites, and the foundation of all other systems change efforts. Whether considering policy, resource allocation, or service integration, effective collaborative efforts were at the base of every best practice. Collaborative efforts hinged on attaining a shared understanding between systems and being able to translate that relationship into formal, tangible goals that positively affected each system and its customers. Regular meetings with formal goals set, shared management, implementation of experimental projects, and aggressive sharing of best practices and information typified the best work of grantees in this area.

Service Integration

Based on a collaborative foundation, service integration was the process of instilling the best practices of a specialized grant project into the structure of the overall service system. To promote seamlessness between partner systems, grantees focused on creating shared intake forms, information management systems, and case management. Using the resources of multiple partners, grantees established new services within One-Stops, such as Customized Support Teams; exploration/discovery; and individualized, community-based job searches. Grantees also used the One-Stops as the staging ground for capacity-building efforts with community providers.

Leveraging Resources

Again working from a firm base of collaboration, shared and creatively leveraged funding proved to be an important innovation for customers with significant barriers to employment. By drawing resources from multiple sources and using funds creatively and flexibly—in many cases purchasing necessary equipment for a business or job seeker—the system increased the effectiveness of its expenditures dramatically. Small pots of flexible funding were a keystone element of resource braiding. They let the system quickly meets customers' needs while simultaneously creating incentives for other systems to contribute their resources to the job search.

Policy and Systemic Influence

The issue of policy change was a significant challenge to most grantees. The first and most important step taken was to thoroughly understand what policies allowed, and the degree of latitude the grantees had to alter or affect these policies and/or their implementation. Research and data collection were also key elements of this effort, ensuring that new policies were broadly beneficial in the reality of service delivery. Looking at policy change, sites needed time and information to develop a comprehensive plan to address obstacles to collaboration or other efforts for quality employment services. Grantees also put considerable effort into examining performance measurement systems.

Sustainability

Efforts to ensure lasting positive change on the basis of time-limited grant activities were a challenge to every grantee. Clearly, sustainability was part of each of these other areas. Although it is impossible to sustain every element of a short-term demonstration project without essentially replacing the resources applied to it, grantees were nonetheless able to use partnerships, shared resources, and policy change to integrate new practices based on the key findings from the services the grant provided. In the end, sites used the direct service they provided as a tool to learn from, and to guide sustainability and systems change.

Following are recommendations to local, state, and federal leaders. Although these recommendations are based on the experience of the Customized Employment grantees, they are designed to apply to multiple levels within the workforce development system, including CRPs, One-Stops, LWIBs, state WIBs, and federal policy makers.

Local Recommendations

Collaboration

Position One-Stops as the hub of local collaborative efforts
One-Stop Career Centers are a natural hub around which partnerships and collaborations between public and private service providers, businesses, and consumer groups can operate. An attitude that encourages collaborative efforts should be an element of operation in every One-Stop, exemplified by management, staff training, and public outreach. The following are some steps a local One-Stop can take to institutionalize collaboration:

- Basic information (e.g., the purpose, customer base, and services offered) on local agencies and organizations engaged in human services and workforce/economic development could be available to staff, partners, and customers (in person and via the Internet), and made a key element of staff training.
- Staff can be cognizant of the various ways that a One-Stop can partner with an organization—everything from short-term shared case management to Memoranda of Understanding (MOUs) and co-location—and could be empowered and trained to reach out not only to customers but to potential partners as well.
- One-Stop public events and outreach/marketing presentations might focus on recruiting potential partners, as well as business and job seeker customers.
- One-Stop leaders might identify other leaders in the community and seek to work closely with them to design (and align) services strategically.

Engage leaders as a key element of collaboration and system change
Leaders from every system can engage in collaborative efforts at the local level. Buy-in and understanding on the part of leaders are essential to the success of long-term, effective collaborations.

To this end, WIB and One-Stop administration might create a guide to engage WIB members to some extent in the functions of the One-Stop. Unlike leaders in other employment systems, WIB members are frequently businesspeople who have little knowledge of the actual workings of workforce development agencies and organizations. Too frequently, these bodies are used not as genuine partners in service delivery but as review boards for policies and practices in which they are not truly engaged. It is the responsibility of staff to provide these boards with appropriate opportunities to exercise real control and provide real contributions. Points of engagement could include, but are not limited to:

- Business outreach

- Future workforce talent needs and recommended training topics for job seekers
- Business service design
- Design and implementation of intake skill assessment (are the right qualities being measured, etc.)

Engage a broad range of potential partners and creative partnership arrangements
Each partner represents a unique contribution of resources and expertise. It is suggested that One-Stops be open to the widest possible range of partners, and to accommodating a creative variety of partnership modes with the intention of becoming the center of a network of cooperative resources. For example, faith-based organizations and legal aid services brought resources to the One-Stop that had not previously been available. These groups helped address other needs that affected individuals' ability to pursue work. The level of partners' commitment varied as well. Some entities provided time-limited activities through a referral process; others established a regular presence in the One-Stop so that customers could be served in that setting and be available for questions or quick referrals.

Engage partners in regular, focused and goal oriented communication
Without overloading staff or partner schedules, regular (monthly, bimonthly, or quarterly) meetings held with partner management and staff are an important means to continually build and enliven collaboration. This model typically evolves out of shared activities or projects, but the habit of communication can be as meaningful as the activities of the project itself.

Absent a specific project (such as a grant), these meetings can be used to establish and promote common goals between collaborative organizations. These might include projects and a jointly managed caseload, or simply a mutually determined list of goals for systemic change. The essential feature is that consistent, goal-oriented communication emerges and becomes sustained as a feature of standard operation.

Service Integration

Establish collaborative functions and services
One goal of the above-mentioned collaborative meetings and activities might be to establish shared aspects of service delivery, administration, and management. Examples of these include:

- Intake
- Data collection and management
- Case management
- Performance measurement

By integrating these functions across partners, the systems themselves become far more seamless and can better initiate more complicated shared functions such as Customized Support Teams and shared funding.

Allow and train for greater flexibility in staff roles
To encourage collaboration at a local level, and to work through the numerous elements of systems and practical change required for a progressive employment system, staff must be empowered to engage in activities beyond a singularly focused job description. By having a partial involvement (.1 FTE) in other institutional priorities of the organization (policy and partnership development, outreach, skill development, etc.), staff become more wholly engaged in the larger mission of the organization. Such involvement could be through such opportunities as task forces, team meetings, and the like.

In addition to staff involvement in organizational activities, staff need flexibility in how they provide services to their customers. Policies and organizational habits and attitudes which limit the staff person's ability to engage in activities in the community limit the services they can provide both to business and to job seekers. If staff do not have the opportunity to interact with both customers in their own environments they will have a narrow view of what is possible and how to creatively meet the needs of their customers. Furthermore, they will be unable to actively engage a wider range of partners to assist in the delivery of workforce development services.

Strengthening relationships with business provides a cornerstone for Customized Employment. Business services staff need to build their relationships with business with an eye towards gaining a more detailed understanding of their needs, challenges, and goals. By working collaboratively with business, staff not only provide more effective business services (beyond just taking job orders) but also create an opportunity to negotiate with the employer around individual job seekers' needs. This focus on addressing both job seeker and business needs is critical to the success of the One-Stop.

Expect and support self-direction from job seekers
The degree of self-direction expected from customers varies between systems. Whereas the generic One-Stop system typically expects absolute self-direction, specialized systems such as CRPs for people with disabilities may provide more support. In either case, staff can be trained to allow for *and support* self-direction. In specialty systems, this means providing services in a way that best supports the individual's goals and desires. In the generic system, it often means training staff to recognize that many job seekers will require some assistance to come to their goals and to make meaningful choices. Many more people (other than those with identified or disclosed disabilities) will require assistance navigating the generic system. Training could be made available to staff (and potentially job seekers) around the concepts of self-determination and self-direction.

Policy

Develop a clear understanding of policies and each leader's latitude within them
Before seeking to change a policy that presents a perceived barrier to progress, local systems should first understand the policy and their own ability to operate flexibly in this context. Designated staff should have a clear sense of:

- What decisions are locally controlled?
- Are there other entities locally that are responsible for controlling the development of the policy?
- How can partners properly go about addressing gaps or barriers in their own policy, and how can they petition others for needed changes?
- What is the result of habits or holdovers from old policies and regulations?

The need to understand the point of control is highly relevant to policy considerations. It is often overlooked in relation to a local system's view of its role in decisions around funding, performance measures, and other important policy features.

Manage performance measures and craft them to expect excellence over compliance
Local control of performance measurement policy can be exercised to the greatest extent possible to meet the needs of the local systems and customers. As with other policy concerns, local areas often fail to realize the degree of flexibility they have in determining and meeting performance measures.

Rather than pursuing measures that lower expectations for certain groups ("regressive measures," which make special allotments for lower measures for people with disabilities or other barriers), local areas might seek to establish *progressive* measures that demand more of the system serving these individuals, and reward this effort accordingly. Examples of this strategy involve WIBs either

rewarding service providers for providing the more intensive services needed, or requiring that services to these groups be sufficient to bring them success. As federal policy around performance measures is largely measured in "bulk" terms, it is typically possible to provide a wide range of services to a wide range of individuals and not see a negative effect on the sum performance results of the local area.

Leverage the vendor and operator certification process to emphasize desired outcomes
The operator RFP process allows the LWIB to define those services and populations that it views as critical, and to articulate expectations in meeting the needs of these populations. Since the operator is evaluated based on these articulated outcomes, the RFP gives the LWIB an accountability system. Training vendors also need a clear message about the expectations for serving individuals with disabilities. Certification processes can *encourage* the creative and progressive use of individual, work experience, and on-the-job training funds to better answer the needs of individual job seekers who require nontraditional services and training resources.

Collect data that reflects the future and present goals of the system, and that can potentially validate progressive efforts
At a local level, systems that focus on progressive work can collect data that reflects their successes and resonates with the standards of their system and, where possible, their major partners. Specialized grant projects tend to report information in keeping with the goals of the grant without determining how their outcomes compare to standard system measures. This data can also be utilized in policy development. Basing policy efforts on hard data can effectively convince those less invested in the policy. It also provides a framework to judge the effectiveness of the policy.

Funding and Resource Allocation

Use partnerships as a foundation for creative and shared funding allocations
The use of progressive allocation techniques, such as braided funding and resource allocation, has proved highly effective. A firm base of partnership must already exist in order for organizations to feel comfortable allocating resources in conjunction with another agency around a single job seeker or project.

Recognize the importance of non-monetary resources in job development efforts
Often discussion around local resource sharing becomes preoccupied with the concept of shared funding. Although funding is a necessary element of every service, it is nonetheless essential to recognize the importance of non-monetary resources and their potential contributions to an individual's job search. For example, a local BPAO/WIPA organization most likely will not be able to contribute funding per se but can contribute a service that enables a job seeker's success and information being shared to One Stop staff.

Determine a source of small amounts of flexible funding
In every successful instance of braiding[4] multiple funding streams to support an individual, the process started with the commitment of a small allotment of flexible funding, typically provided directly by a Customized or Workforce Action grant. This first contribution seemed to pave the way for other agencies and organizations to commit funding and other resources. Many agencies are averse to being the "first spender," particularly on ventures (such as entrepreneurship and resource ownership) that be perceived as speculative. Local systems might try to identify a standard funding

[4] Braided funding involves more than one public funding source authorizing their dollars to be included in an individual budget. Each public funder maintains control of its dollars, and each tracks expenditures for agreed purposes and evaluates return on investment. In braided funding, the funding sources remain visible while they are used in common to produce greater strength, efficiency, and/or effectiveness.

stream that could serve this purpose. VR, for example, has a great degree of flexibility in its funding allotments, and could serve this purpose if its funding practices were adequately expedient.

State-Level Recommendations

Collaboration

Encourage and support the state WIB to act as a focal point of collaboration
Echoing the role of One-Stops as hubs of partnership in local areas, the state WIB may position itself at the center of statewide partnership activities. State WIBs are inherently connected to governors' offices and have mandatory representation from business, state agencies, and other important state players. Using the state WIB as a forum for statewide partnership-building and collaborative efforts also naturally moves business leaders and service leaders into a closer working relationship, thus leading to a more effectively business-driven system overall. To this end, the state WIB can actively seek to recruit members from a broad array of large and small businesses, and from a wide variety of service leaders in a given state.

Many of the efforts that involve building partnerships between agencies and service organizations can presumably occur in a subcommittee so as not to engage the entire board in what can be a time-consuming process. Still, the overall board should remain informed of what is occurring within the subcommittee. Furthermore, the subcommittee in question may have a broad representation by leaders who can effect change in their own organizations, rather than representatives who can talk about partnership without moving their system towards it effectively.

Finally, the state WIB and its partners can seek to establish and implement a set of common goals for the service system in the state. Important goals typically hinge on the establishment of common practices and policies that apply to all relevant service systems involved in the state's One-Stop Career Center collaboration, potentially including:

- Intake, orientation, and assessment procedures
- Information collection and management
- Case management and resource allocation
- Performance measurement

This group also has the potential to act as the leader in implementing the following recommendations, all of which follow a similar theme of state-level collaboration and common goals, measures, and methods.

Convene working groups representing systems change efforts across the state
A variety of grant initiatives are focused on improving employment outcomes for a wide variety of job seekers. These efforts can have a forum to interact and establish strong collaboration. As grant projects are inherently challenged by their time limitations, the ability to establish a broader collaborative scope is key to having a real impact on state and local systems.

Use data to identify the most effective practices and share those practices broadly
State leaders need to look across a variety of funding streams and service delivery systems, identify the most effective practices, and apply those practices across the broad customer base. Effective strategies in serving returning veterans, displaced homemakers, or recent immigrants need to be translated to other populations that might benefit.

Service Integration

Define and empower standard competencies for workforce staff, preferably across agencies
The state needs to act as a leader in defining competency standards for staff and making training available for local systems. To allow for the necessary degree of local control required in this

endeavor, it is advisable to develop a list of core competencies by working with local areas that have the clearest sense of their own needs.

Once consistent expectations of staff competencies are identified, training resources need to be made available throughout the state. Developing state-level training curricula will create consistency in the information that is disseminated. Local areas will also need to be supported in providing some of their own training, to ensure that staff understand the intricacies of their local community and partners.

Create models of and guidance around collaborative service delivery
Collaboration around service delivery aspects such as intake, training, job development, and resource allocation has been repeatedly shown to maximize the effectiveness of each partner's resources. However, local areas often struggle to determine where and how they can collaborate. If the state WIB develops models of collaborative efforts, provides guidance to institute them, and offers information about the benefits of such collaboration, local systems will be far more likely to engage their partners tangibly.

Establish a statewide business outreach plan
To balance the needs of businesses and job seekers, it is recommended that the state develop guidance to establish business outreach efforts. Information might detail not only how best to serve the business customer but also how to ensure that good business service also means better service to all job seeker customers, regardless of the complexity of their needs. Tap state WIB members to provide guidance on how to integrate good marketing and placement of individuals with significant barriers to employment into highly effective business services.

Policy

Define policy and local and state latitude for change
As with local systems, it is extremely important that state officials have a clear sense of the latitude they have. In some cases states interpret federal policy and regulations differently, and do not necessarily realize the flexibility they are allowed within those regulations and policies, both inherently and through waivers.

In addition to having a comprehensive grasp of their own policy parameters, state leaders can encourage local systems to define their own fields of flexibility. This might be accomplished by assembling a group of statewide leaders to express their concerns, while working with state representatives to define their own latitude in changing the relevant policies. State WIBs can then release guidance to local areas in ways that defines areas of control and encourages implementation.

Offer guidance in key policy areas
State-level leaders can create a series of model policy and guidance documents, including:

- Model MOUs for the state, endorsed at the state level by the agencies that would enter into them on the local level. These documents could offer sample language around sharing costs and space, common goals and service populations, potential braiding of resources, and the specific concerns of shared case management.
- Informational guidance to local systems on the role of various agencies and the potential for local collaboration.
- Policies and performance measures that tangibly *reward* collaboration, over and above supporting it as an abstract goal—for example, policies that explicitly allow shared case management and resources, and performance measures that explicitly reward systems for partnering around an individual job seeker. RFPs for One-Stop operators and competencies for staff could also reflect this priority.

Engage local areas to proactively define their performance measurement system
Performance measures are a matter of considerable concern for local systems attempting to serve customers with multiple significant barriers to employment. Local systems often perceive that federal measures built for high-volume, generic efforts inherently put systems at a disadvantage should they serve job seekers who require greater resources.

However, although they must continue to meet the base standards applied by the federal systems, states nonetheless have a considerable degree of creativity in defining how they will meet these standards. State leaders should first come to a clear understanding of their latitude in defining measures, and then work closely with local systems to design measures that both comply with the needs of federal measurement and provide local incentives to meet the needs of all job seekers. Above all, states should not be afraid to demand excellence over compliance from their local systems.

Understand the way partners measure success and the implications for collaborative efforts
Performance measurement also differs between systems. An important part of the state partnership discussion will include how best to balance these different standards in joint service ventures. Ideally, the different federal expectations placed on various systems can be beneficial in allowing for a varied range of services in a local area.

Disability entities (e.g., Mental Retardation/Developmental Disabilities, mental health agencies, community providers) need to communicate that employment is the preferred outcome.
Many states still struggle with a dual service provision system for individuals with disabilities, where segregated employment options coexist with community-based employment services. It is recommended that State policy makers communicate the clear value that employment in the community is the preferred outcome, and their policies and funding mechanisms support that message.

Establish a consistent standard for tracking information about disability status throughout the workforce systems
In order to effectively track and evaluate services to customers with disabilities, One-Stops must obtain disability-related information and identify data elements that help track the efficacy of those services. As with other data collection elements, these might be standardized across multiple systems to allow for a uniform understanding of the demographics of the state's job seekers.

Funding and Resource Allocation

Define and encourage funding latitude for local systems
State and local systems are often uncertain about how best to contribute to funding joint ventures, whether on an individual or programmatic level. As a part of its collaborative efforts, and as an aspect of its role as a leader in policy definition, each state system could carefully define local areas' potential roles in braiding funding and resources. The parameters, then, will encourage innovation and urge staff to understand the limits of local policy so that they may experiment without running afoul of restrictions.

Given the repeatedly proven success of shared funding as a means of supporting employment goals, state systems can make their support of such creativity tangible. Possible methods for include:

- Encourage shared case management and resource allocation as part of progressive performance measurement.
- Provide fiscal support to state and local joint ventures and shared project management. Sources for such funding include the governor's 15% set-aside under WIA funding, and innovation and expansion funding under VR.
- Highlight success stories regarding shared funding, joint case management, and resource ownership.

Federal Recommendations

Collaboration

Create an interagency work group on collaboration
Federal workforce development authorities could form an interagency work group to promote seamlessness and collaboration at the state and local levels. This group could potentially take responsibility for initiating many of the following recommendations across members' various agencies.

Sponsor information briefs on various partner systems and their role in state and local workforce development
At the local and state levels, lack of knowledge regarding other agencies is often the key barrier to collaboration. An important first step towards local and state partnerships would be to create information briefs describing the basic purpose of other agencies, the population they serve, and the resources and services they provide.

Include a "ramp up" period for partnership-building in future long-term systems change grants
As the findings of this report clearly show, a solid foundation of collaboration is essential to work involving complicated service delivery and systemic change. As such, long-term grants might include a period of time, potentially at a lower rate of funding than later years, which allows grant sites to build a foundation of partnership. Funding rates could allow some service delivery, as practice is often the best means to strengthen partnership, but then not expect service levels equal to later years.

Model effective collaboration at the federal level by funding grant initiatives across agencies
Federal agencies need to communicate the importance of partnership through their actions and funding priorities. Identifying areas of common interest and potential barriers to local collaboration will result in a model demonstration effort that could provide states and local communities the flexibility to make some significant systems change.

Service Integration

Define Customized Employment, and establish a milestone payment system for it under multiple funding streams
Customized Employment has been shown to be a highly effective service model. However, local areas often struggle to deliver such services, as they are not identified in the payment systems of different partners. Clear definitions and standards must be created for the component services of Customized Employment (exploration/discovery, portfolio development, negotiation, etc.). Ideally, these definitions and standards would conform to the service allotments for multiple authorities, including, but not limited to the Rehabilitation Services Administration, Health and Human Services, Centers for Medicare and Medicaid Services, Employment and Training Administration, Education, and Veterans Employment Services. Once these standards are clear and confirm with multiple authorities, equivalent payment structures should thereafter be established that follow the expected outcomes of services.

Encourage and support broad staff competencies and tie them to incentives, performance measurement, or authorizing powers
Basic core competencies for workforce development staff can be established on a federal level. These could presumably be broad and permit a high degree of local control, while also defining the key expectations that are held of all such staff. Ideally, these competencies and the methods for enforcing or recommending them would be established through collaboration across multiple authorities.

Along with generic workforce development concerns, it is recommended that other elements be included in the competencies:

- Supporting self-sufficiency
- Person-centered and individualized service methodology
- Collaborative service delivery

Create guidance and models for state and local common intake processes, shared case management, etc.
Collaborative efforts around service delivery can be encouraged through federal initiative and guidance. Creating and disseminating guidance and sample policy documents, and including discussions around collaboration efforts in the requisite strategic planning process, would hasten the movement towards local and state collaboration.

Policy

Disseminate clear summaries of local and state policy latitude
As noted above, confusion regarding the nature of policy and regulation is an impediment to systems change. Federal authorities might offer formal guidance on this issue, including a means to determine the degree of flexibility of these policies at state and local levels.

Create model local and state performance measurement systems based on best practices, and guidance on the extent of local control on this issue
Federal authorities might create model local and state-level performance measurement systems that clearly define ways to encourage excellent customer service to a broad range of job seekers and businesses, including job seekers with significant barriers to employment. Guidance then would include information about the degree of control local areas have over negotiating performance measures. Model local measures should typify a progressive system that rewards the intensive, individualized service required by some job seekers, without compromising on the expectation of success.

Create performance measurements that are shared across multiple relevant agencies
Furthermore, an interagency group could be established to explore the possibility of creating shared performance measurements across multiple systems relevant to workforce development. Although different authorities have different needs, it is nonetheless advisable to create a common language of measurement against which each system can consistently evaluate its state and local entities.

Funding

Create and disseminate guidance around creative, shared, and flexible funding
The rules around sharing money on a project level, or simply braiding it for an individual, are complex. Staff members' fear of running afoul of regulation tends to squelch innovation. These concerns would be easier to overcome with clearly stated guidance synthesized from multiple authorities. Guidance should not only detail what is allowable but also set progressive methodology

(such as resource acquisition and braided/flexible funding) to actively encourage such innovation locally.

Identify a way to create flexible funding in local areas
One lesson clearly shown in the findings from multiple grantee sites is the need for a small allocation of highly flexible, easily accessible money to meet a wide range of job seeker needs. In addition to overcoming urgent barriers (such as lack of transportation or appropriate clothing), flexible funding can act as a magnet to funding from other systems that do not typically act as the "first funder." It is recommended that leadership in federal authorities clearly identify means by which small amounts of highly flexible funding can be accessed within their system, and disseminate this guidance to partner systems, job seekers, and frontline staff.

Create performance and monetary incentives for state and local resource sharing
Furthermore, given the proven effectiveness and economy of such strategies, its use could be encouraged through policy and monetary allocation. One example of a potential federal fiscal incentive program would be to establish an easy application grant process that would match monies for state systems (on a 1:2 basis) with an equal amount of WIA state money (presumably from the governor's discretionary funds) and VR innovation and expansion funds. Both of these streams are intended to spur innovation in a state but are too seldom used for collaborative projects. By providing matching funds for such projects, the systems would be compelled to collaborate. Allocating funds for flexible use is one example of the type of project these resources might fund.

III. Development of Partnerships and Collaborations

Partnerships are the cornerstone of both the workforce development system and the systems that support the employment of people with disabilities. As the interface between these systems developed, grantees entered a new realm of collaboration. Understanding these systems' parameters and operating conditions, coming to consensus on common goals, and redefining roles in response to these goals created opportunities on both the direct service and system levels.

The mix of partners involved per project varied based on the method of implementation, primary focus, and the community in which it was based, to name a few factors. To illustrate the array of partners involved, a sampling is highlighted here:

Local and State Workforce Investment Boards
One Stop Career Centers
Community Rehabilitation Providers
Public Vocational Rehabilitation
Small Business Development Centers
Faith-Based Organizations
Wagner Peyser & Workforce Investment Act Employment Services
Departments of Developmental Disabilities/ Mental Retardation
Business Leadership Networks
Public School Systems
United Way
Assistive Technology Centers
Universities
State Departments of Labor
Independent Living Centers
Legal Aid
Advocacy Organizations
Veterans' Programs
Mental Health Organizations

Key Findings and Successful Strategies

Understanding Partners

Many grantees found that understanding various partner and support programs was a critical first step in fostering collaboration and interdependence.

- When initiating more collaborative relationships within their workforce systems, Flint, MI and Hempstead, NY recognized that they could not realize true collaboration until they fully understood their partners and the parameters under which they functioned.
- In partnering across the workforce development, disability, and employer systems, Boston and Indianapolis found that each had its own distinct terminology and definitions for similar activities. To ensure that the systems' goals, expectations, and benefits were aligned, these projects established common language and definitions among partners.
- Although the San Diego project credited co-location as beneficial to facilitating partnerships, only through a working knowledge of partner systems and their policies did strong collaboration occur. Once this knowledge was gained, the fluidity and effectiveness of collaboration increased.
- El Paso sought to understand all the employment service providers in the community in order to maximize the use of resources and opportunities for collaboration.

Building on Preexisting Partnerships

When initiating collaboration, using existing relationships moved efforts forward. These relationships were also found to provide a friendly entry point and establish credibility within new systems.

- Detroit and Vancouver carefully selected their primary subcontractors based on previous relationships and experiences, consistent values, and the specific expertise offered.
- Although expanding the number of project partners was a continual goal, Benton-Franklin, WA first sought opportunities to integrate efforts into existing partnerships or collaborations. This helped bring the right people to the table quickly and reduced the time needed to establish new relationships at the project's onset.
- In Boston, capitalizing on the relationships and accomplishments of previous and existing initiatives—ranging from local advisory committees to a statewide Medicaid Infrastructure Comprehensive Employment Opportunities (MI-CEO) initiative—was invaluable in fostering systems-level collaboration.

Identifying Shared Values and a Common Vision

Grantees emphasized the need to identify shared values that influenced professionals and the agencies they represented. Identifying common values, vision, and goals helped build trust, interest, investment, and support.

- It was critical for the Boston project to address values and expectations about employment for people with significant disabilities before introducing specific employment models or advancing towards systems change efforts. Time needed to be spent promoting, universally, the idea that everyone can work.
- Similarly, Cobb County, GA found that achieving systemic change was as much about changing individual minds as affecting policy.
- Establishing a cohesive and committed team that shared a vision was instrumental for El Paso to create change to better meet the employment needs of the community.
- When clearly defined goals with apparent beneficial outcomes were established among partners, Athens, GA found that partners were often willing to contribute time, resources, and possibly funding towards those goals.
- Similarly, Fairfax, VA identified the parity between VR and Customized Employment goals in order to align the partners. After that, a key feature of partnership efforts became the broad applicability and dissemination of Customized Employment to a larger audience.
- Montgomery County, MD clearly identified the value Customized Employment strategies added to other systems, thereby gaining support for and adoption of these strategies despite the considerable effort required to master them.

Partnerships Enhanced Through Collaborative Service Delivery

Both the partnerships themselves and the progress towards systems change were promoted through collaborative efforts on the individual customer level.

- According to the Cambridge, MA site, systemic and policy change were best guided through direct work with job seekers that resulted in tangible best practices. This strategy also proved to be a highly effective means of building lasting partnerships.
- El Paso found that when done well and effectively, braiding funds and services for mutual customers promoted further collaboration and the sustainability of these efforts.
- Collaboration in Cobb County, GA occurred because project staff were enthusiastic about meaningful practices such as Customized and self-employment, and shared this with other community members. Good partnerships were built on the strength of shared successes and a powerful dissemination practice by the project. This hands-on experience was meaningful for staff and promoted further investment.
- In Frederick, MD, the successful establishment of small businesses for customers with disabilities and the recognition of these meaningful outcomes acted as a catalyst for broad local service partnerships.
- As individual successes were realized in Vancouver, formal resource sharing agreements were established.

Multilevel Partnerships

Though collaborative service delivery is an effective way to demonstrate new ways of conducting business and promoting systems change, state- and federal-level support was also necessary to bring the effort to a broader scale. Effective systems change needed to occur at all levels: national, state, and local.

- Both Benton-Franklin, WA and Frederick, MD found that linking local and statewide levels allowed all participants to learn from one another and provided a forum for further networking.
- The Frederick, MD project focused much of its energy on a systems change campaign at the state level. By employing existing ties to the various state systems, the project helped coordinate a steering committee that took on a comprehensive examination of the state employment service system.
- In Georgia, partnerships towards collaborative systems change were most effective when they operated on both local and statewide bases. State-level representatives with decision-making authority over funding and organizational commitment were engaged at the onset.
- Alaska also ensured buy-in at the state level at the inception of the project. Consistent working group meetings provided the opportunity to process information learned through service delivery and helped bridge the gap between local- and state-level participants.

Collaboration Opportunities

Those grantees that clearly defined the roles and tasks of partners as the project evolved were successful in maintaining their continued commitment and engagement.

- Vancouver built a cohesive relationship on a series of collaborative activities, including active involvement in employment-related initiatives, service implementation meetings,

and strategic planning events.

- Partner-based work groups were highly effective in Alaska, particularly when they were assisted by an outside facilitator and based on mutually agreed-upon goals, and met regularly.
- The effective use of advisory groups, partner planning meetings, and other groups was crucial in Cambridge, MA. The project maintained group cohesiveness and commitment through clearly identified goals, specific outcomes, and follow-up meeting notes.
- Clearly defining partners' roles and tasks as the project evolved helped El Paso ensure their continued commitment and engagement. Consortium meetings, integration task force meetings, and the establishment of a WIB disability advisory council are examples of activities that used partners effectively.
- In Detroit, it was critical to establish a clear project organizational structure that incorporated multiple constituents on various planning committees, management groups, and work groups. Partners participated on specific groups that capitalized on their expertise and experiences. Teams and subcommittees were very outcome-oriented and had clearly articulated visions and objectives.

Overcoming Obstacles

Multiple and Complex Partners

Grantees recognized the need to understand their partners—both internal to the One-Stop system and external—to most effectively capitalize on these resources to benefit both the customer and the system.

When assisting customers to leverage system resources, the first step for Hempstead, NY was to identify the array of employment resources available. To this end, staff compiled a comprehensive HempsteadWorks resource matrix. This manual included information about mandated and non-mandated partners within the system, the services they provided, eligibility criteria, and funding opportunities. The resource manual was accessible to all partners within the system and included both traditional and nontraditional providers. The effort resulted in enhanced communications and collaboration among providers.

Flint, MI developed a monthly training program, called "Meet Your Neighbors," to help One-Stop providers better understand their community partners. The initiative was established in response to an identified need. It offered the opportunity for various programs to educate their partners on the range of services provided, populations served, and opportunities for further collaboration. This strategy also enlightened providers and partners regarding the array of services that customers could receive as a result of blending[5] and braiding funding and services.

[5] Blended funding occurs when public funding sources 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. Blended funding pools dollars from multiple sources and make them, in some ways, indistinguishable.

El Paso took the concept of understanding partners to a broader scale when the project procured experts to conduct employment resource mapping of the El Paso community. This community resource mapping process involved an interagency team comprised of key stakeholders. Team members established a common vision and identified existing and duplicative resources as well as gaps in services and supports. Community employment providers identified the array of services available to job seekers with disabilities, program eligibility criteria, and how services could be accessed. The process resulted in a strategic action plan to help the project work more collaboratively and efficiently, and develop cost-sharing strategies (such as braiding and blending funding) around employment supports.

Maintaining Partner Engagement

It was sometimes challenging to maintain partner commitment and engagement throughout the life of the project. The following strategies were effective in utilizing available expertise and maintaining partnership engagement throughout the span of a project.

Joint strategic planning by grantees ensured partner buy-in. Such a plan most often included a vision statement, guiding principles, goals, strategies, and recommended actions. One of the initial activities that helped Indianapolis engage partners and elicit their investment was to begin the strategic planning process with a common vision. Using various strategic planning methods, the project identified a three-to-five year vision, a goal statement, and steps required to achieve that goal. A core group consisting of the five primary partner agencies participated in this process, with additional representatives engaged throughout the evolution of the project. Partner representation instilled a sense of ownership, reduced reliance on any single person within the organization, and expanded the resources available to achieve goals.

Strategic planning committees were formed in a number of sites, including Hempstead, NY; Detroit; and Napa, CA. With representation of key constituents at decision-making levels, strategic planning teams often resulted in city- or state-level systems change. The Detroit project held Future Search strategic planning forums where 85 participants addressed critical areas of employment, training, and support for Detroit residents with disabilities. The charge of the group was to create a vision for Customized Employment across the city's workforce system and propose a set of strategic recommendations for improving employment outcomes for people with disabilities. This process provided a framework for a strategic plan and common vision statement that encompassed all areas of life (e.g., employment, transportation, housing, education, assistive technology). As a result of this multiple-constituent effort, not only were desired futures for serving customers with disabilities identified but also links within the community were expanded for ongoing investment in and support of this shared vision.

The Cambridge, MA Advisory Board had a range of leaders from multiple internal and external systems, including VR, the Department of Mental Retardation, and the Department of Mental Health. It proved to be an important planning forum that led to stronger systemic ties between all the agencies involved. The Department of Mental Health, which had initially been less involved in the project, became a more integral partner on the basis of these meetings. For the future, the board hoped to focus on garnering additional grants to create opportunities for further collaboration.

To sustain the accomplishments of its projects and maintain disability as a priority, the El Paso project developed disability councils as LWIB subcommittees. The council advised the board on the Customized Employment project, program service sustainability, and disability employment issues such as recruiting, hiring, and training opportunities. The disability councils were comprised of project consortia members and targeted areas such as ensuring equal opportunity and access to the system; developing relevant policies (e.g., accommodations, training); and identifying new or continuing community initiatives for the employment of job seekers with disabilities.

The Knoxville, TN project created a very active business advisory council as a subcommittee of the WIB. The council had the following goals:

- Provide the WIB with information on disability and diversity issues in the workplace
- Advise the WIB on ways to promote inclusion and diversity in general workforce development policies
- Function as a planning group to aid in the developing strategic direction towards increasing the employment of individuals with disabilities

Frederick, MD focused on a state-level systems change campaign. The project used its ties to the primary disability agencies, the Department of Education, the Department of Labor, provider agencies, consumers, and advocates to create the Employment System Transformation Steering Committee. This committee "initiate[d] a comprehensive examination of the employment service system for Marylanders with disabilities" through the following goals:

- Establish common employment definitions
- Identify value-driven outcomes
- Create a vision/map for how the system should look
- Define initial action steps towards realizing the vision

Through the course of its work, the steering committee generated numerous recommendations to various state systems.

Impacting the Way Systems "Do Business"

Developing partnerships often face the challenge of changing the fundamental environment in which partners operate. Funding cuts and staff turnover are elements of the culture that exacerbate such challenges. They heighten the need for additional training, continued support through technical assistance, and quality assurance monitoring to sustain Customized Employment services within agencies. Otherwise, Customized Employment services may be diffused to the point of ineffectiveness and result in lesser outcomes.

In several communities, grantees made a concerted effort to enhance the capacity of One-Stops and CRPs to provide employment services to job seekers with disabilities. For this reason, grantees provided regular training on Customized Employment and disability issues to One-Stop staff and community partners. Projects developed and provided curricula to community providers, community mental health centers, VR staff, and the local school system. In

Indianapolis, Customized Employment training was being integrated into a simultaneous statewide supported employment training program.

As the partnerships among the One-Stop and community service providers in Knoxville, TN grew, the project became concerned about the quality of work that the community service providers offered. To address this situation, the project created Customized Employment services training for staff from One-Stops, state agencies, and community service providers to ensure that the quality of services was high. Through their Service Provider Consortium, service providers could access a range of staff training on a regular basis. Sessions included Customized Employment approaches, building effective employer relationships, and other practices to improve the overall quality of service delivery.

Because training and short-term technical assistance may not be enough to modify long-standing practices, oversight and quality assurance checks are critical to assist partners with adopting new practices. The project manager in Detroit invested time in conducting case record audits with providers to monitor service provision by the array of internal and external providers. The manager issued sanctions if customers were not receiving Customized Employment services as outlined in provider agreements.

Systematizing Service Delivery Arrangements

In a number of sites, challenges emerged around mutual understanding and service delivery arrangements. To address this issue, grantees created various forms of clear, written agreements—formal and informal—that recognized common objectives and interdependent roles and responsibilities.

In Vancouver, MOUs were developed as the relationship between the WIB and the mental health provider strengthened. The administration of the mental health organization began to recognize that the relationship with the WIB benefited not only their customers but also their business. The WIB also recognized the value of disability consultation for policy and procedural issues, and therefore contracted with the mental health program for 10% of the vocational director's time.

Throughout the duration of the Richmond, VA project, the VR program was one of the project's most significant and complex partners. Each system had difficulty communicating its priorities to the other, which created a number of issues. However, these and other barriers were surmounted through the process of creating the MOU between the One-Stop and VR.

Limited Partner Resources

No single partner or source of funds can adequately respond to the comprehensive spectrum of needs of job seekers with disabilities. Moreover, at times changes in partners' working environments impacted their ability to contribute services to the project. Decreases in program funding for employment service providers increased staff turnover and reduced overall staff levels. Generally speaking, the additional up-front exploration, planning, and job development time needed to serve people with significant disabilities acted as a disincentive for partners to provide services as opposed to the more "traditional" service delivery model of deferring customers to alternate agencies such as VR.

Several projects helped ameliorate these issues by implementing multiple-partner customized support teams. These teams diffused any one partner's responsibilities and leveraged resources from a variety of sources. Rather than relying solely on one partner program for employment success, customized support teams provided a wraparound approach that included braiding funds and resources to serve customers and increase employment outcomes. This strategy proved effective in Alaska, where it was being generalized to use with customers with a variety of barriers to employment. The Richmond, VA project applied a similar team approach. Customers with significant support needs were assisted through person-centered planning techniques, which included a preparatory meeting with One-Stop partners to determine the partners' roles based on the needs and goals the job seeker expressed.

Discussion

While taking the first and crucial steps towards systems change, grantees recognized that building relationships takes time. Developing team trust and cohesiveness was critical to making progress. Project leads noted the need to take the time to facilitate an understanding of each other's systems and constraints. For example, bringing together community providers and One-Stop staff to engage in something akin to resource mapping provided an opportunity for team building while helping partners become familiar with each other and local resources. Establishing ground rules for group settings, and ensuring that problems were viewed as team or shared problems, set the tone for true collaboration. This non-threatening environment aided partnership development. To promote organizational/systems change, it was important to ensure that various perspectives were heard and that critical players were comfortable with decisions as efforts move forward. Only over time, as partners felt a true spirit of collaboration and mutual benefit, did project goals begin to materialize.

Grantees' implementation strategy made a significant impact on partnerships—their members, evolution, and challenges. As noted in the introduction, three general implementation frameworks emerged:

1) Project activities and service provision stayed primarily with One-Stop staff and management.
2) Activities were based primarily within the One-Stop, while a disability provider, CRP, or other entity was responsible for implementing the individual services.
3) Project activities were primarily based externally at a CRP.

As a result of the funding parameters, the grant recipient for WorkFORCE Action grants were disability providers and so were more likely to implement the third model.

Each implementation design offered its own set of strengths and issues. When project activities were based within the One-Stop and implemented through One-Stop staff and management, there was a clear perception that the One-Stop system was the target of change. Disability partners' expertise was needed to equip One-Stop staff with knowledge and skills. One-Stop staff generally acquired an understanding of disability issues and the ability to shift from standardized services towards a customized approach. Still, it remained a challenge to merge the culture of a

performance-based, self-serve system with a customer-centered model that leveraged multiple resources and customized services.

This model was typically more effective for systems change, with the downside that the goal of quality Customized Employment services and individual outcomes may have been somewhat sacrificed. WIBs were generally more invested in the effort and could often bring policy and systems change, to some degree, to the state level. In a few cases, with intensive technical assistance, the system was able to adopt Customized Employment services. More often, successes with this model included enhanced collaborations with the disability services system, enhanced policies and partner agreements through modifying MOUs, and the adoption of Customized Employment and customization principles and strategies by One-Stop partners.

Projects designed along the second framework faced their own challenges with partnerships. It was not as clear that the One-Stop system was the target of change. The practice of some One-Stops of deferring customers to VR prior to project implementation often morphed into deferral to the project staff. This problem required mentoring and education to staff about serving customers with disabilities and presenting the full menu of One-Stop services, with VR and/or project involvement as an additional option and not the default. When the disability provider drove project activities, they frequently found it challenging to gain buy-in from the WIB/One-Stop and achieve significant systems change. Grantees often had to choose between creating One-Stops systems change and providing quality Customized Employment services to individuals with significant disabilities. However, providers often met with success in training One-Stop staff and mentoring service delivery for customers with disabilities, as well as accessing various partner resources to accomplish this.

When project activities were externally based at a CRP, partnerships with the disability community were more forthcoming while engaging the One-Stop system often proved more challenging. WIBs were typically less engaged. These projects typically focused primarily on enhancing service delivery and achieving quality Customized Employment outcomes. Although there were varying degrees of success, the focus on systems change may have been compromised with this model, with the emphasis instead on demonstrating individual employment outcomes and linkages between the disability services and One-Stop systems. However, these projects made progress implementing creative employment strategies and building the capacity of VR, CRPs, and sometimes nontraditional partners to provide Customized Employment services. Targeting specific partners who could benefit from the universal application of Customized Employment strategies (e.g., TANF, Veterans, older worker, ex-offenders) proved particularly effective with this model. Communities also often increased their commitment to the goal of enhancing employment outcomes for people with disabilities.

Regardless of how projects were organized, partners inside and outside the workforce development system had to come to understand their partners before effective collaboration could occur. Interface between the disability services system and the workforce development system was often a process of merging cultures and employment philosophy, including the belief in the capacity of people with disabilities to work. Grantees spent varying degrees of time and effort in recognizing differences and coming to consensus on common language, expectations, definitions, and outcomes.

Identifying shared values or guiding concepts and principles was critical to partner commitment and the direction in which activities progressed. Shared values projects generated included:

- Choice—expanding customer options
- Cooperation—working together
- Trust—open communication
- Interdependence—the benefits of multi-agency collaboration
- Advancement of human potential—the expectation and belief that people can work with appropriate supports
- Customization—individualized response to individual needs
- Flexibility—open to change in policy, practices, and support relationships

IV. Integration of Service Delivery Strategies within the Workforce Development System

As service delivery strategies were developed, grantee staff worked to integrate those strategies into overall One-Stop operations and promote their universal application to a range of customers. As these strategies evolved within the One-Stops, they typically occurred either within generic services, which were adapted to serve a wider range of customers, or as new services.

Key Findings and Successful Strategies

Customizing Practices Within Core Services

WIA core services are designed as high-volume, self-directed resources for job seekers. While they can assist a wide range of job seekers, they often prove a challenge for those with complex barriers to employment. Following are examples of strategies sites used to assist all job seekers to access these services.

- In Boston, Chattanooga, TN and Knoxville, TN, projects provided training to customers with disabilities to foster independence, self-directedness, and self-determination. After this proved successful, grantees expanded the strategy to include a broader range of One-Stop customers.
- Detroit modified case management reporting software to capture information on disability. This helped the project craft services and understand customer needs.
- In Benton-Franklin, WA, One-Stop managers established fixed staffing for greeter and resource positions. Asking all staff to cycle through these positions increased center cohesion. This site proved that consistent staff rotation paves the way for a deeper sense of quality and accountability to these positions. Also, fixed staffing made it easier for project staff to introduce customized service principles to these staff through training and mentoring.
- Many grant sites, including Richmond and Fairfax, VA, benefited from and contributed funding to Navigator-style positions.[6] These positions opened the door to standard services and allowed broader access to generic resources. Experimental projects at some sites even suggested that the navigator model might apply well to the whole range of customers with significant barriers to work, not just people with disabilities.
- Alaska and Richmond, VA modified and standardized intake forms to be shared by all major workforce partners. With the customer's permission, entry into one system could easily be transferred into another. This decreased the administrative burden of sharing resources and case management, and lessened the likelihood that an individual would be referred out of a system.

[6] Navigators are disability point-person positions funded by a joint initiative of U.S. Department of Labor's Employment and Training Administration and the Social Security Administration (SSA). Established in 2003, the purpose of the program was to provide information, through the One-Stop system, about work support options available to SSA beneficiaries and others with disabilities. These positions had funding to support and guide staff working with individual job seekers but to also support systems change and capacity-building around disability issues.

Customizing Intensive Services

Like core services, intensive services are often designed for high-volume environments, which can make them difficult for some customers to access appropriately. The following are examples of grantees that worked to expand the nature and effectiveness of these services.

- In Richmond, VA, grant funds were used to augment the high-volume youth project so that youth customers could take advantage of some customized practices. These practices include mentoring, job shadowing and internships. This collaboration and customization not only resulted in a more successful project, but in ongoing funding from VR to continue the efforts.
- The Montgomery County, MD One-Stop established a partnership with the WIA funded Intensive Service Unit to serve customers who could not use standard, generic services successfully. This group provided both service and policy guidance to the One-Stop, and collaborated with grant project staff to coordinate services for individuals with significant disabilities.
- In many sites, including Benton-Franklin, WA and Cambridge, MA, it became clear that customers in the customized grants needed intensive case management. This presented a significant challenge to sites seeking sustainability, and suggested the need for strong partnerships to increase both funding and staffing.
- Vancouver project staff collaborated with the One-Stop's Business Service Unit. In the Washington WorkSource system, Business Service Units are divided by industry and heavily oriented towards a demand-driven strategy. To face the challenge of customizing services to job seekers in this context, the grant embedded a business service representative who was focused primarily on disability and customization issues. This person both worked with companies and assisted other unit representatives with these skills.

One-Stop Administration and Quality Assurance

Sites worked with One-Stop leadership to make their guiding policies and practices generally more welcoming to a broad range of job seekers.

- Cambridge, MA and other sites issued multiple surveys during the grant to determine how welcoming customers felt services were. Staff and customer surveys showed that "welcomeness" of services was related to the extent to which One-Stop staff and management felt that serving people with disabilities was a critical element of the One-Stop's mission.
- In Detroit, quality assurance became a piece of the One-Stop operator selection process. Standards determined by the grant were enforced in the process of contracting with operators. Continuation of their contracts was contingent on meeting the standards established.
- Fairfax, VA and other sites established mystery shopper programs to help ensure that services addressed the needs of customers with disabilities.

WIB Involvement

As the local leadership bodies of the workforce investment system, WIBs can be a powerful force for change. These are examples of proactive involvement of WIBs to support grantee initiatives and goals.

- In San Diego and Vancouver, among other sites, the LWIB administrative bodies and members themselves became keenly aware of and interested in the success of the customized grants. Their involvement included a strong sense that they would "champion" the efforts of the grant. This was backed up with formal policy changes and revised performance guidelines that provided incentives to serve people with disabilities.
- In Illinois, the state WIB created a strategic plan that set a path of leadership towards greater systemic integration and better service. The keystone elements of the plan were:

    - Need for seamless service delivery
    - Improvement of staff knowledge and skills
    - Awareness of needs of the disability community
    - Need for collaboration with non-partner disability agencies
    - Need for accessible support services
    - Need for baseline standards
    - Need for a culturally appropriate marketing plan for people with disabilities
    - Establishment of employer-to-employer outreach

Institutionalizing Practices Through Customized Support Teams

Customized Support Teams worked jointly to plan with and support an individual job seeker. Specific sites institutionalized the practice of using such teams to meet the needs of their job seekers with barriers to employment.

- Many sites, including Alaska, Detroit, and Napa, CA, worked with Customized Support Teams consisting of multiple partners who all jointly took some responsibility for an individual's needs. While this practice was time-consuming, it typically resulted in success for individuals who needed more supports than a single organization could provide.
- In Richmond VA, customers with significant disabilities participated in a person-centered planning process and met with partners to coordinate needed services. In this way, each participant had a clear concept of its own role in the process. Team participants sometimes changed as the individual's employment process and relevant needs progressed. The One-Stops were also developing a system to allow considerable information sharing between partners to ensure continued engagement from all parties.

Coordinating with Community Service Providers

As the One-Stop system is designed to be high-volume and to engage a wide range of partners, many grantees worked closely with community providers to establish partnerships. In these arrangements, the community provider conducted the more intensive services that were often not viable for One-Stops to offer with their own limited resources.

- Many projects, including Utica, NY and Knoxville, TN, focused on building capacity in community providers through training and mentoring. This helped the sites ensure the long-term availability of customized practices after grant funding ended.
- Many of Alaska's project sites formed a significant partnership between VR, the One-Stop, and community service providers. The One-Stop acted as the gateway; VR provided some case management and funded the efforts of the community providers who in turn provided intensive Customized Employment services that neither One-Stop nor VR staff could provide. The effectiveness of this practice appeared to depend in part on the flexibility of the community providers. This practice seemed set to continue after grant funds ended, as it could be funded through "standard" means, such as ongoing VR funding.

Self-Employment

Some sites identified self-employment as an important strategy for both customers with significant complexities and customers seeking self-sufficiency in struggling economies.

- In Cobb County, GA and Montana, among other states, sites provided intensive assistance in small business development for some individuals. In addition to proving an important strategy for individuals with complex barriers, self-employment ventures created some of the most compelling partnership, creative funding, and resource ownership examples experienced by grantees. In one instance, VR, the grantee, the Social Security Administration, and the Department of Agriculture each contributed funding to support a small truck-hauling business. This variety of partners was nearly unprecedented in standard employment ventures.

Overcoming Obstacles

Need for Quality Assurance

Staff training on Customized Employment is critical to quality service provision. However, often training has a time-limited effect, especially in light of high turnover and the tendency to revert to "standard operating procedure" in the absence of a special grant or project. Many grants focused on training as a major piece of systems change throughout their projects but still experienced frustration as they realized that long-term changes had not taken place, or that their effectiveness was limited at best.

Some grant sites responded to this challenge by making training available online (Richmond, VA and Frederick, MD). Others worked extensively with a variety of marketing pieces, often employing instructional video case studies that explicated the goals and standards of advanced customized practices (Montana and Cobb County, GA). The Cobb County Community Services Board went a step beyond this and was able to truly institutionalize advanced practices in a wide range of staff—to the point that new staff were acculturated into these practices. In addition to strong support from leadership in that project, there was a wide range of staff that all looked to maintain the grant's standards. They created a culture of higher expectations.

Multiple Intake Processes

Resource sharing and collaboration within the One-Stop has repeatedly been shown to be an essential piece of successful customized practices. However, it is often highly challenging. In most sites, co-enrollment doubled the burden of time and energy on the customer, and presented numerous administrative challenges for the two or more organizations involved. However, enrollment was a prerequisite in every system for people to receive services.

Multiple sites met that challenge with a shared enrollment form that worked for every One-Stop or workforce partner equally. This form could be shared from one system to the next at the customer's behest, often with as little as an addendum of information required for each new enrollment. This greatly reduced the administrative burden on both case managers and customers.

Business Service Units: Missed Opportunities

Business Service Units were inherently driven by the needs of business—their primary customer. As noted, in many states these units were divided by industry. These were often seen as surrogates of the business community and its concerns, and, as such, could be perceived as showing a preference for job seekers who presented minimal barriers to employment.

In the Vancouver and Benton-Franklin WorkSource Centers in Washington state, projects placed grant-trained business outreach specialists in these teams to model customized business outreach and marketing to other unit representatives. With this approach, practices that may be viewed as focusing on the needs of the jobseeker (e.g. job negotiation and carving) were found to be very responsive to the demand-side needs of employers. In a business service unit context, where representatives often have very close and trusting relationships with community businesses, these strategies might be particularly effective and allow unit representatives to expand their services to include something akin to human resource consulting to small business, based on these customized techniques.

Managing Collaboration with Community Service Providers

In Vancouver, the WorkFORCE Action project exemplified many of the challenges and rewards of collaboration between a One-Stop and a community service provider. The project hinged on the existing partnership between Clearview Employment Services, a service provider with a focus on mental health issues, and the local One-Stop. The challenges they faced in collaborating ranged from administrative and technological (allowing an outside organization access to the WorkSource MIS system) to methods for sharing cases and resources.

Two key factors played a role in the success of the project. First, both sides maintained an ongoing commitment to work through the challenges they encountered. Barriers to collaboration are too significant to predict at the inception of a project, and must be continually addressed throughout. Second, the LWIB took a strong hand in this partnership, acting as a mediator when discussion could not resolve challenges. With the involvement of the LWIB (which contracted

for services both the One-Stop operator and the community provider), neither side could simply step out of the effort but had to continue to work through their challenges.

As a result of the collaboration, the One-Stop instituted many innovative customized practices, and the project developed a clear method for providing intensive services as needed through Clearview. The project was successful enough to compel the WIB to continue the collaboration with Dislocated Worker funds. At the time of this writing, these dollars were funding Clearview's efforts to work with dislocated workers with disabilities.

Institutionalizing Customized Employment in the Generic System

Including a time-intensive process such as Customized Employment in a high-volume "generic" system proved to be highly challenging. Although many grantees were able to provide Customized Employment services through the grant, often with grant staff who worked within the One-Stop, of a greater concern were the solutions that would last beyond grant funding. How does a One-Stop make time, and find and correctly allocate funding, for Customized Employment services?

In Alaska, many sites created a partnership involving the One-Stop, VR (often a co-located partner), and various community service providers. The One-Stop remained the hub of operations, where customers are encouraged to come for services. However, through the intake process, trained staff recognized when an individual might be recommended to VR services *as well as* One-Stop services. Once the customer was enrolled in VR services, VR contracted with any one of a number of small (often a single staff person) community agencies that provided Customized Employment services.

This partnership was part of a grant-long process of systemic reorganization that examined, piece by piece, each element of One-Stop services. This analysis involved the leadership of each major partner in the One-Stops and resulted in real change (sometimes even physical changes) in Alaska service delivery. One-Stops were on their way to being truly seamless and inclusive of a wide range of partners. Finally, with the work done to bring highly flexible outside providers within the system, One-Stops gained the capacity to provide the full range of Customized Employment services on an ongoing basis.

Systemic Barriers to Self-Employment

As challenging as it has been to build Customized Employment into the One-Stop setting, it seemed even more difficult to institutionalize self-employment. Grantees reported that One-Stop staff often discouraged this path, even for individuals who did not require a customized solution. This was due in part to their understanding that performance measures often did not account for self employment, and the fact that many One-Stop staff were unfamiliar with this issue.

In Montana and Georgia, projects found success by reaching out to a wide variety of community, state, and federal resources. One-Stops were partners in this effort but not, in most cases, the lead entity. It remained clear that, given the level of coordination and time required, most staff in labor exchange would not be able take the lead role in customized business development for

individuals with significant barriers to work. Partners such as VR, community providers, or microenterprise centers could facilitate this process.

In Montana, grant staff used the One-Stop as the hub for much of its business development work. They were able to access WIA Supportive Services funding to support customers working to establish businesses. Staff brought together such varied resources as VR, Social Security Plans for Achieving Self-Support, and Department of Agriculture funding, among other sources.

In Georgia, a partner was available to give the One-Stops and grant staff some leverage on the issue. The Edge, an Atlanta-area microenterprise organization, became a close partner both of the community agency that led the grant, and the One-Stop itself. Edge staff now attend One-Stop partner planning meetings and are part of the network of agencies that receive referrals of job seekers and potential entrepreneurs from the One-Stop.

Discussion

Service integration concerns revolved around both expanding existing practices, services, and policies to the widest possible customer base (customizing generic services), and adding new services designed to serve those with the most complex barriers (institutionalizing Customized Employment services). These goals were clearly related, however, and neither was likely to be successful without the effective implementation of the other.

Customizing generic One-Stop partner services is essential to fulfilling the One-Stop's promise as a hub of community employment services. Sites in Alaska, Utica, NY, and Richmond, VA worked closely with their local One-Stops to create a system *everyone* could use, and that was widely known as an important resource for both job seekers and employers. Without broadly inclusive intake and service procedures, comprehensive and easily accessible tracking systems, and customer satisfaction practices that capture the responses of a diverse customer base, a One-Stop that serves the whole community is not possible.

Many of the practices reflected here, such as shared intake forms, navigators, and intensive service unit teams, contributed not only to the inclusiveness of the One-Stop but to its seamlessness as a system. However, no matter how effective these customized generic services are, there will invariably be instances when job seekers require more intensive, individualized services. In many cases, it has been shown that WIA funding alone often cannot support every individual who requires this level of service.

Success was apparent where the One-Stop was oriented to serving and including the entire community. Good Customized Employment practices depend on broad participation by numerous partner entities. Strategies such as Customized Support Teams, subcontracted customized service provision, and the provision of assistance beyond standard core services require highly effective, dynamic partnerships. Along with job seekers and businesses, workforce development agencies of all types and clientele must view the One-Stop as a hub of activity.

V. Experiences Leveraging Resources for Common Goals

Job seekers who require more intensive employment supports will also likely benefit from the support of multiple funding and resource streams. "Braiding" resources is important and valuable, whether to fund a broader array of services or help buy equipment the individual can use in the job search. This effort is highly complex and often runs into many barriers despite systems' attempts to share resources creatively. Shared or creative funding allocation can occur either at a programmatic or individual level, and can involve either monetary or non-monetary resources.

Key Findings and Successful Strategies

Braiding Resources Around an Individual

The complex lives of many job seekers call for coordinated resources from multiple sources. The following are examples of sites that used resources from multiple entities to meet one individual's needs.

- In Montana, multiple agencies (including VR, Social Security, WIA, Microenterprise, and the Department of Agriculture) came together around a given individual and provided either funding or other resources to contribute toward employment goals. Since self-employment was often the goal in these two sites, shared funding efforts typically entailed purchasing equipment for a developing business.
- In Cambridge, MA, a small amount of flexible funding was used to encourage other partners (such as VR) to contribute dollars to an employment plan. See "Flexible Funding" section below for more details.
- Multiple sites made clear that creative funding arrangements flourished in systems that valued person-directedness. Personal control over funding and resources could not happen without the underlying belief that individuals should direct and be responsible for their own job search.

Flexible Funding

When facing the difficult goal of braiding monetary resources from multiple entities around a single individual, having a small but flexible allocation of funds available was extremely helpful. These funds could meet small but immediate needs that often crop up in the job search.

- In Utica, NY and other sites, grant funds were used as flexible, quick-response dollars to meet customer needs. The small amounts of funding that were allocated under the grant's budget were used for resource acquisition, small business development, and emergency needs such as clothing and car repair.
- In Montana, Social Security Plan for Achieving Self-Support (PASS) dollars were very flexible for a variety of customers. Although it can be somewhat complicated to access these funds given the complexity of determining eligibility, it is an underutilized source of flexible dollars that can support employment goals.

Resource Acquisition

Resource acquisition emerged as an important outcome when using braided resources. Purchasing equipment that became the property of the job seeker increased the individual's value as a potential employee or entrepreneur. This was among the most important examples of putting resources directly in the control of the individual.

- Customers in Cobb County, GA and Alabama could purchase equipment both in support of small businesses and for traditional employment efforts. Customers used various funding streams for these purposes. This setup was similar to an individually directed account, where funds from various sources are dropped into an account that an individual could use freely. In this case there was no account, but the person chose purchases based on employment goals and used various funding streams to buy equipment.
- In Cobb County, GA WIA Individual Training Account dollars were used for resource acquisition for eligible customers.

Programmatic Resource Sharing

Many sites chose to blend resources at a systematic or programmatic level. This allowed them to offer services that were co-funded or co-sponsored by multiple agencies, which would in turn provide more thorough service to a broader range of job seekers.

- In Vancouver, the Clearview mental health employment agency and LWIB expanded the services available to One-Stop customers by pooling monetary and human resources. A formal MOU provided the foundation for a blend of finances, staffing, and resources (core services, etc.).
- Knoxville, TN project staff and consultants coordinated a four-part partnership between the One-Stops, VR, the Division of Mental Retardation Services, and community employment services providers. This network was mutually beneficial, allowing easy service coordination and payment for community providers who implemented customized practices for customers referred by the One-Stop or VR. A series of Letters of Understanding (akin to MOUs) underwrote these partnerships.

Non-Monetary Resource Braiding

Policy makers often think primarily of braiding or combining money. However, local levels proved to have a broad range of untapped, non-monetary resources available for individuals.

- The Hempstead, NY and Peoria projects braided their services with those offered by other community resources, such as Benefits Planning, Outreach, and Assistance services and WIA core services.
- Recognizing that many factors affect an individual's ability to pursue employment, Montgomery County, MD grant staff coordinated the management of housing, transportation, and personal care needs.
- In Montana, collaboration with a sheltered workshop yielded a variety of non-monetary resources to support multiple customers' self-employment goals. The Milk River Activity

Center provided transportation, job coaching, and other staff support for multiple customers in integrated, profitable businesses. Incidentally, this collaboration also resulted in many of the Center's customers starting their own businesses.

- In Cobb County, GA, "The Edge," a microenterprise center, was engaged as a major partner to the project. Microenterprise centers work with very small businesses, akin to those typically assisted through Customized Employment methods. The grant worked closely with the Edge to ensure the universality of its training methods. The partnership resulted in a connection to low-interest loans that such projects usually did not have access to. The center's training was also highly valuable to the project.

Overcoming Obstacles

Administrative Barriers to Sharing Resources

Agencies' spending rules and performance measures sometimes became administrative challenges that could stand in the way of effective resource sharing. Spending policies tended to lay out direct examples of allowable expenditures, with little allowance for sharing resources with other agencies or creative spending allowances. As such, without specifically prohibiting such spending, policies often effectively discouraged it.

In Vancouver, efforts of the One-Stop, WIB, and local mental health provider (Clearview) were complicated by the performance measures imposed upon the One-Stop's operator. One-Stop staff perceived something of a contradiction between stringent performance goals and providing services to individuals with barriers to employment. In response to this, the WIB developed a graded performance measurement system that demanded that the system not simply meet flat outcome goals but also provide a wide range of services to the whole community.

In Richmond, VA VR felt unable to commit resources to "generic" projects operated within the One-Stop, even if there was a perceived benefit to some VR customers. The agency's mandate states that funds must not be spent on individuals without disabilities; agency staff feared that committing funds to a generic project (which, by definition, served a wide range of individuals, with or without disabilities) would violate this mandate. In response, project staff gathered information proving that over 60% of the project's participants were youth with significant disabilities who would be eligible for VR services. With this information, an MOU was developed that allowed VR to cover the cost of the project that had previously been absorbed by the grant.

In Montgomery County, MD the One-Stop's policy was to require customers to make five visits to the One-Stop to use core services and wait for thirty days to access additional WIA funding through Intensive Services. This proved especially challenging for Customized Employment grant customers, who often did not benefit from self-directed core services. In response to these and other intensive needs, the One-Stop and the grant worked together to create an Intensive Services Partnership Team. This unit spearheaded both policy analysis and flexible, intensive services. At the time of this writing, One-Stop staff were reviewing One-Stop intake and eligibility rules and requirements.

Human Resource and Time Demands

In almost every case, and certainly when partnerships and methods were new and untried, significant staff time was required to braid resources effectively. As grant project staff often played a role in facilitating resource sharing, and would likely cease to have the necessary time after the grant ended, grants took various steps to fill this need.

Recognizing that information and referral is the foundational element of person-centered resource blending, Peoria established systems within the generic workforce project to expedite referral and information sharing with VR and other major partners. These were specifically designed not to refer customers "out" but rather to allow access to a broader range of services. Richmond, VA and Alaska both went so far as to develop joint intake forms that automatically directed an applicant to as many partners as seemed applicable, and eliminated the need to re-enroll for each new agency. Although these practices had clear ramifications for systems attempting to better blend their resources, they were also innovative steps towards the WIA system's original goal of "seamlessness."

To that end, sites such as Peoria and Cobb County, GA engaged benefits planners to leverage resources. Such planners act as guides to various work incentives and flexible funding streams that depend on the individual's SSI/SSDI and Medicaid status.

In Tennessee, project staff developed a funding strategies planning form to help staff gather the necessary information on each job seeker and maximize their ability to take advantage of the widest possible range of funding. This form was completed on intake and was designed to lay the groundwork for planning employment and coordinating necessary ancillary support services. The strategy mixed elements of benefits, employment, and whole life planning to ensure a comprehensive but practical strategy for the individual and their support staff.

Multiple and Complex Funding Sources

A clear challenge to the desire to leverage various funding streams was knowing what those streams were and how to access them.

In Chicago, Thresholds, a project partner, applied to be a provider in the City of Chicago Ticket to Work pilot. This pilot tested a "capital investment" approach to assist Employment Networks to overcome some perceived disincentives of the payment system, allowing 4-5 payments for services over the year. The money was through the state Department of Rehabilitation Services and the Mayor's Office on Persons with Disabilities and allowed providers to receive payments while providing services rather than waiting for Social Security Administration reimbursement.

VR agencies in every state were seen as a potential source for flexible, braidable funding on both programmatic and individual levels. That said, while VR became an important partner in most sites, it did not happen without considerable time and effort. Sites faced multiple challenges, including the fact that VR was frequently not accustomed to concepts such as flexible funding, person-directed funding, and resource ownership. VR also often hesitated to mix its funding with other streams.

Each site faced the most significant challenge creating shared goals with VR around the validity of braided funding and resource ownership. VR agencies have traditionally worked in conjunction with standard community providers or supported employment services. Freeing up money to purchase resources (outside of assistive technology) or buy nontraditional support services is often outside traditional practices.

Cobb County, GA staff worked with VR counselors who operated with some autonomy. Working with that VR agency was essentially a two-part process. Systems change required buy-in at both the central leadership and counselor levels. The grant used a marketing strategy to address this issue. Staff from the LWIB created a multimedia presentation that explained the concepts of braided funding and resource ownership, linking the explanation to real success stories. This proved effective in the project's efforts to collaborate with VR staff.

Limited Access to Systems' Funding

In Montana, in spite of difficulties accessing Individual Training Accounts and other funding streams through WIA, many Customized Employment customers were able to access supportive services funding. This funding stream was designed to provide quick-response support for job seekers who require housing or sustenance as they seek employment. When customized solutions required time to assemble, this funding stream could be necessary in the interim.

Individual Training Accounts were both a challenging and helpful tool for Customized Employment. These accounts are designed to provide training to job seekers, typically around certification courses. They are typically dictated by a host of locally designed policies that restrict their use and often pose challenges to individuals with complex needs. As the highest level of WIA-specific options, "training" services had the most stringent guidelines around their use.

Cobb County, GA project staff worked on this issue from several standpoints. First, they co-located staff in the One-Stop and attended the One-Stop's planning and management meetings regularly. Second, they worked with many customers referred by the One-Stop. One example is a customer who was seeking self-employment and had the support of VR and the Edge Microenterprise Center. He benefited from an Individual Training Account (ITA) that supported him to acquire the skills to open a hair salon. Given that ITAs allow both training and the purchase of equipment necessary to that training (which the customer thereafter retains), these funds can fit into a Customized Employment plan nicely.

In Knoxville and Chattanooga, TN, project staff successfully accessed state Medicaid waiver funding. This worked particularly well in instances where a community provider referred an individual to the project for customized job search services. In these instances, the individual received long-term supports from that agency and paid for these services under the state's 1915(c) Home and Community-Based Waiver, which allows employment supports as a payable service. This strategy depended on each state's waiver and the agency's ability to access the funding.

Discussion

Partnership is the basis of all braided or multi-source funding agreements. The ability to access and employ multiple funding streams requires knowledge of the various systems involved and their funding priorities. Furthermore, a system's willingness to commit funding to a creative endeavor depends on their knowledge and trust of the various stakeholders. Formal agreements between systems, such as MOUs, make resource sharing easier.

Funding could be braided on either systemic or individual levels. Systemic resource sharing could occur in jointly managed projects or shared staff positions. Funds braided around an individual require that the job seeker be eligible for support through each of the various funding streams. This type of braiding was often time-consuming, requiring considerable case management, but it also created some of the most innovative Customized Employment and entrepreneurial successes nationwide.

In most cases, a small but flexible allotment of seed money encouraged other systems to commit to braided funding ventures. In instances where flexible grant dollars were available and could be accessed quickly for a wide variety of purposes, other systems were typically more willing to contribute further funding towards the same goal. States showed conclusively that this allotment need not be large (often less than $1000), but it had to be dictated by the individual's employment plan and accessible with very little delay. Without grant funding, most sites struggled to find a similarly flexible and customer-directed allotment of funds.

Resource acquisition (the use of funds to purchase equipment or tools on behalf of the customer) was shown to be a particularly potent use of flexible funding. Although the practice was used primarily for entrepreneurial goals (i.e., to purchase equipment for businesses) it also applied to individuals seeking standard employment. In many career paths, possessing relevant tools or equipment makes an employee a more valuable asset to a company. As such, resource acquisition is an empowering practice for the job seeker.

Customer-driven funding choices require a customer-driven system. When a system or organization is acculturated towards a person-directed service philosophy, funding choices will be more creative and dictated by the needs and preferences of the customer.

VI. Policy and Systemic Influence

Customized Employment and WorkFORCE Action grants were charged with conducting model demonstration of individual-level service delivery as well as creating systems change within their local communities and/or states. As sites began to demonstrate the effectiveness of Customized Employment with individuals with disabilities, stakeholders began to look at ways to structure services to make them available to a broader population and institutionalize the approaches beyond the grants' lifespan.

Key Findings and Successful Strategies

Local Flexibility

Local systems had considerable control and flexibility about service provision, and projects worked with local WIBs to exercise this control effectively. Many sites were able to negotiate more flexible processes for joint service provision and funding with mandated partners than existed in other parts of the state. Individual success stories created an atmosphere of openness and flexibility towards developing policies from these examples to apply more broadly.

- Flint, MI created an information and referral position to provide more individualized services to customers with barriers to employment. Initially put into place for individuals served under the grant, this role became critical for other individuals who were not benefiting from the self-serve resource room. This staff person also showed other staff how to serve a diverse customer base using a customer-driven approach.
- Partnership with the local BPAO provider was an important accomplishment in Indianapolis. The project established an advanced referral system that combined the resources of the Customized Employment grant and the BPAO project. The result was easier access for customers to basic SSI/DI information and an expedited process of BPAO services for individuals who needed more extensive information.
- El Paso staff developed and revised job descriptions for three positions to be absorbed by the operator after the grant: system navigator, career counselor, and job developer. All infused Customized Employment strategies into One-Stop roles and functions.
- The Chattanooga, TN LWIB (Nashville, WAG) made a local policy change to allow part-time workers to be eligible for on-the-job training services. This program had previously been available only to people who worked full-time. This policy change was driven by the area's participation as a Nashville hub.
- The Utica, NY project found that the system could not respond to the urgent needs of employees with disabilities who were in danger of losing their jobs. The Customized Employment grant created a car repair and purchase program through self-directed funds that allowed individuals to have consistent transportation so they could obtain and maintain employment. Individuals in this program were required to participate in financial counseling to ensure they could maintain their car and employment.
- El Paso revised case management practices and policies related to One-Stop operator testing and assessment to allow Customized Employment strategies as an option for customers with significant barriers to employment.

Systemic Policy Changes

To achieve systemic change beyond the funding cycle of the project, sites communicated with staff, operators, and vendors to convey expectations for Customized Employment services.

- The Peoria grant developed an agreement with the VR system to create a milestone payment system for services. The first installment was paid when an individual got a job. The second payment came when the person had maintained their job for five days, the third at 30 days, and the fourth at 90 days. The project built a long-standing employment program for individuals with significant mental illness in a catchments area where no such service had existed before.
- Anoka County, MN developed a policy that made employment the initial consideration for people with disabilities and supported Customized Employment services delivered by community partners, the school system, the workforce system, VR, the Department of Developmental Disabilities, and mental health service providers.
- The One-Stop operators in El Paso and Hempstead, NY integrated Customized Employment into their RFP for WIA vendor services. Applicants were required to demonstrate an understanding of Customized Employment concepts and strategies in their proposals. Additionally, in Hempstead the One-Stop's MOUs with partners provided a framework for how customized services were provided for HempsteadWorks customers.
- Discovery or exploration is a key step to learn about the individual and form the basis for a Customized Employment plan. Detroit developed agreements with rehabilitation providers for a specific and standardized rate to provide discovery services and develop a vocational profile.
- All One-Stops in Alabama went through a Commission on Accreditation of Rehabilitation Facilities (CARF) certification process. Grant staff worked with CARF to establish guidelines on accessibility and services to all customers. These guidelines were slated to become the statewide standard.

Building Capacity

All sites provided training opportunities for staff, including in-person options, distance education, and mentoring. To ensure that staff integrated this information into their work performance, several sites built expectations into their annual reviews concerning staff competencies in serving customers with disabilities.

- Montgomery County, MD created a new partnership with the local Community College that resulted in a non-credit certificate course on advanced job development using Customized Employment strategies. The Community College agreed to continue to offer the course up to four times a year without grant funds.
- Northern Virginia WIB (Fairfax, VA) required that all One-Stop staff receive training and become certified in workforce development areas. As a result of the project, changes were made to the WIB's staff training and certification process to emphasize customized practices and priorities.

- WIA staff performance evaluations in Napa County, CA included knowledge of accessibility and interview skills when working with people with disabilities.
- The Southwest Washington Workforce Development Council (LWIB) in Vancouver made serving individuals with disabilities a higher priority. The LWIB developed a policy to reward staff for successfully placing persons with disabilities, which was reflected in performance evaluations.
- Staffing and service provision were also addressed in the contract the Rio Grande Workforce Board (El Paso) established with the One-Stop operator. Specifically, frontline One-Stop staff were required to attend a series of trainings to enhance their capacity to provide Customized Employment services, including conducting individualized assessments, developing portfolios, and conducting negotiations with employers for a mutually beneficial job fit.
- Job developers in Flint, MI faced a number of issues with populations they did not previously have expertise and/or experience serving. The project implemented twelve months of job developer training that included information and resources on how to assist ex-offenders, many of whom had learning disabilities, mental health, or substance abuse issues. One-Stop job developers also engaged in more intensive peer support and technical assistance activities, such as participation in Customized Works! employment planning meetings for specific customers. This gave the job developers a mentoring and skill development opportunity that helped them serve their own customers with barriers to employment. An additional positive outcome of these activities was that they made job developers' work more collaborative.

Multilevel Systems Change

Policy change must occur at multiple levels to be effective. Sites were able to influence local policy and practices as well as work at the state level to address policy barriers.

- Projects in Virginia, Georgia, and Montana were involved in statewide efforts to develop Medicaid buy-in programs. These programs would promote employment for individuals with disabilities and address anxiety about losing Medicaid coverage, which could be a potential employment disincentive.
- Further policy change concerning self-employment occurred in Indiana through identifying Rehabilitation Services Administration (RSA) policy directives regarding coding various employment outcomes through the RSA reporting system. As a result of the project manager's efforts, the state VR agency created a new VR line item code under supported employment services titled "supported self-employment." With this in place, VR could support entrepreneurs with disabilities to achieve their goals, with creative funding to offset startup costs and job coaching needs.
- The Illinois limitation on the amount of income people who live in a nursing home can earn continued to present a barrier for these residents to become employed. Staff members from Peoria were involved in efforts to educate the state legislature about this issue. In response, the Illinois House passed a resolution requiring a study of the income limits for nursing home residents.
- The state of Illinois had a work group called Brand New Day that addressed vocational services funding issues for people with mental illness. The Chicago site was very actively involved with this group and began to streamline the terminology and eligibility of

similar services available to individuals with mental illness. This group also provided technical assistance to the state's Department of Human Services to convert its billing system from grant-funded to fee-for-service for supports rendered.

- The Peoria grant was involved with a review of all the various vocational activities provided by community mental health centers. The goal was to identify specific activities of customized employment that could be billable under the mental health Medicaid rehabilitation rules.
- The Athens, GA site sponsored a commissioner's work group with representation from the Department of Human Resources, Department of Labor/VR, Department of Education, Medicaid, Developmental Disabilities Council, University Center for Excellence, and Georgia Protection and Advocacy. This was an ongoing effort to integrate an "employment first" policy in the state and use the experience of the grant to foster lasting systems change around Customized Employment principles in all state-sponsored services.
- The Frederick, MD project coordinated an Employment System Transformation Steering Committee that included the state Department of Disabilities, Department of Rehabilitation Services, Department of Health and Mental Hygiene, Division of Developmental Disabilities, Department of Education, and the Department of Labor, Licensing, and Regulation (which oversee WIA funding allocations). The committee's stated purpose was to initiate a comprehensive examination of the employment service system for Marylanders with disabilities. One outcome of this committee was a pilot project that used Customized Employment in the state government hiring process.

Local Performance Standards

A common perception of workforce system personnel—from staff at the front desk to management to the local board—was that customers with disabilities are "difficult to serve." This belief could make staff hesitant to enroll customers with disabilities in the WIA system. Several sites established local standards for performance and provision of services to individuals with disabilities to address this concern.

- To focus the One-Stop's commitment to serving individuals with disabilities, El Paso built into the One-Stop operator RFP process the requirement that a minimum percentage of job seekers with disabilities were to be served through the system (5% to be increased each year).
- The Vancouver LWIB developed a proposed policy to avoid the tendency towards "creaming" to meet performance measures in its One-Stops. The proposed "investment grid" established a more precise system of service values to certain populations with more significant barriers to employment, and for the development of jobs considered particularly valuable to the local economy. Customers who had received the most support received high point values. Placing a job seeker from a special population (e.g., an individual with a disability) into a job with a priority status (e.g., health care or information technology) received the highest point value. The grid had not become current policy; rather, it was a suggested conceptual model for One-Stop and partner performance measures. Steps were being taken to enforce the grid's standards as LWIB policy and to hold provider systems accountable to the priorities it established.

- San Diego stressed the importance of providing services to individuals who were considered “special populations," including individuals with disabilities. In the first year of this shift, additional funds were provided (in coordination with Customized Employment grant funding) to assist local One-Stops with this effort. After that, One-Stops failing to meet the revised service levels for special populations would be put on an improvement plan. Failing to meet this plan and its requirements would eventually result in decertification. This provided the required impetus for local sites to remain vigilant in their training and serve a wide range of customers.

Overcoming Obstacles

Advancing from Grant Implementation to Systems Change

All of the grants were charged with systems change, but some sites were more successful in moving this agenda forward. The way a site originally designed and implemented the grant determined, to an extent, systems change and the sustainability of these efforts. Sites that were less effective in systems change had set up their services as a separate program and were less integrated into the operations of the One-Stop. With services more segregated, One-Stop staff and partners were less likely to see the Customized Employment strategies demonstrated as being relevant to their population.

The Cambridge, MA project was very conscious about integrating Customized Employment efforts into the options offered at the One-Stop. Although there were One-Stop staff specifically assigned to work with eligible candidates, these staff members used the range of One-Stop options and worked to make all these services responsive to all customers, including those with disabilities. The One-Stop manager reported that this effort made the center rethink how they provided services to all its customers and that they “now do business differently." Cobb County, GA and Knoxville, TN also demonstrated success in the approaches developed under the grant, which were then expanded to all customers.

Data Required to Inform/Influence Decision Makers

To influence systems change, sites found they needed more than just good ideas or intentions – decision-makers wanted data to support these decisions. Grantees reported that data collected under WIA performance measures tended to underreport the true use of the One-Stop by individuals with disabilities. Therefore, some LWIBs did not necessarily view this as a priority issue. Sites worked to challenge this perspective by educating boards on the reasons why disability is underreported and identifying other approaches to track usage by individuals with disabilities. The Detroit Workforce Development Department added elements to its WIA tracking system that expanded questions on customer characteristics, including disabilities, Customized Employment services provided, employment outcomes, and retention.

During the first year of implementation, Napa County, CA did an extensive qualitative data collection effort that included input from over 200 community members. The strategic plan developed after this data collection provided the framework for systems change efforts.

Anoka, MN worked with the local university to implement a rigorous data collection system that tracked services to transition-age youth in the county. Not only was this data system effective in identifying services that contributed to employment success, it also tracked individuals who did not obtain employment. This information contributed to a change in outreach efforts to engage out-of-school youth and ensure that schools considered employment for all students, even those with more significant disabilities.

The resource list Utica, NY implemented was not originally considered a data collection effort, but over time the project realized that the list was providing important information for assigning resources. The project developed the resource list to help all customers identify areas of potential need so that staff could make appropriate referrals to partners. When individuals first began to work with the One-Stop, they were asked to complete a checklist that included employment variables such as assistance with job search or training as well as life support resources such as housing, day care, and medical insurance. When the information from these forms was aggregated, the WIB could identify the needs of its customers and locate potential areas where resources were insufficient.

Need for Policies to Support Customized Services

One-Stops are typically designed to handle a large customer flow, with self-service and standardized practices the mechanism for customers to meet their employment needs. To ensure that One-Stops were equipped to allow service customization beyond the grant-funded period, grantees worked with their LWIBs, One-Stop operators, and VR programs to ensure that their policies reflected these expanded services.

More individualized service provision was reflected in modifications to testing/assessment and case management policies in El Paso. These policies were revised to allow more customization using formula funds and customer-centered strategies. The testing and assessment policy allowed alternatives to the typical standardized assessment tools and practices. Assessment strategies were to be based on the individual job seeker. An array of alternative assessment strategies was introduced, ranging from nontraditional interest inventories to the discovery process for customers with significant disabilities. This constituted a major shift away from the standardized approach to assessment that had previously been used. Case management policies were also modified to allow for divergence from the traditional case management model—specifically for coordinated service delivery through multi-partner team meetings for job seekers receiving Customized Employment services.

VR policies were modified in Indianapolis as an expansion of the services then offered. Working with Bureau of Rehabilitation Services leadership, project personnel incorporated Customized Employment into the VR system's services and policies. Cost-sharing occurred by developing Purchase of Service Agreements (POSA) between VR and specific, qualified community providers who were competent in Customized Employment services. After that point, Indianapolis VR financially absorbed the cost of service for eligible individuals who required Customized Employment strategies to obtain employment. This clearly had mutual benefits, as VR customers attained employment opportunities not previously realized. Additional POSAs

were being developed with qualified Customized Employment providers to enhance services and provider choice for job seekers with disabilities.

Need for State-Level Changes Reflecting the Reality of Local Implementation

Some sites struggled with directives that came down from the state level that either did not consider their local communities' needs or were unnecessarily cumbersome to implement. To address this concern, several sites made sure that staff who were directly involved in grant implementation were also involved in state-level systems change efforts. That local implementation perspective was effective in achieving systems change that addressed both state and local concerns.

Staff from the Boston grant worked closely with other state systems change efforts to increase the focus and commitment to employment at the state agency level. In conjunction with the Massachusetts Medicaid Infrastructure/Comprehensive Employment Opportunity grant, they were conducting an analysis of Executive Office of Health and Human Services funding for employment services. Participation on the strategic planning team provided an important opportunity to influence the process.

The Customized Employment manager in Juneau, AK participated in designing the statewide Customized Employment pilot, which replicated the approach within clients of the Department of Public Assistance. What she learned during her startup years in the grant—both successes and challenges—was important information to consider in the replication effort.

Local Entities Underestimate the Control They Have in Developing Policy

Although WIA calls for local flexibility and control so that services can be designed to respond to the local community, many staff felt constrained by state and federal policies. In some cases, there was an assumption that because practices had been in place for a long period they must be based on official policy. As sites started to look more closely at these "policies" that created barriers to creativity and innovation, they began to understand that there were fewer constraints than they imagined. Although there were state and federal policies that had to be considered, there were also examples of sites being innovative within the implementation of those parameters.

Some of the local flexibility was defined through contracting processes. For example, El Paso's contract required its One-Stop operator to become an Employment Network provider under Social Security's Ticket to Work program and to ensure that customers with disabilities had access to Customized Employment services to meet their employment needs. The contract also addressed staffing and service provision. Including such language in the operator's contract sustained the benefits gained from the project—including innovative, effective employment strategies for workers with disabilities, and an expanded capacity in the system to serve diverse groups through the One-Stop—beyond the life of the project.

Several sites found it challenging to serve individuals with disabilities when the Test for Adult Basic Education (TABE) evaluation system was required for individuals to participate in training. Cobb County, GA looked at the possibility of substituting a vocational profile for

TABE in the WIA system, and using a vocational profile as supplemental evidence for the viability of an employment goal within the VR system.

Barriers in Program and Service Accessibility

Workforce development systems often struggled to help customers with various abilities, learning styles, and barriers benefit from the programs and services available at and through One-Stops. By applying the principles and concepts of universal design for the workforce[7] system, these grantees promoted ease of use and meaningful access to employment services and opportunities.

In Napa, CA the state Department of Rehabilitation and Access Ingenuity (a consulting firm on assistive technology) provided assistance to identify facility, program, and service accessibility barriers and solutions for the One-Stop partners. Local universal access assessments and work groups, comprised of service providers, One-Stop staff, advocates, and consumers, were established to review accessibility issues and ways to develop services that were more coordinated and provided greater choice for people with disabilities.

Similarly, Cambridge, MA conducted accessibility audits of its One-Stop facilities, programs, and services at the onset of the project. Recommendations and subsequent modifications were then made to enhance core services, to benefit various learning styles; intake and registration practices and procedures; written products such as the calendar of events and marketing brochures; and labeling and other visual aids within the resource room.

One step towards implementing universal access to Hempstead, NY's One-Stop programs and services was by developing a Powerpoint orientation or "Information Exchange." The Information Exchange was shared with all new customers during the orientation process. It included information on the array of employment services available, including those specific to any given population. The tool incorporated information on disclosure of disability, confidentiality policy, and the availability of assistive technology at the One-Stop. Providing workshop information in various formats fostered understanding by a variety of people, whether they had a learning disability, limited English proficiency, or low literacy level, for example. Developing CD-ROM portfolios for job seekers represented another step towards universal approaches, as customers and employers benefited from using electronic representations of the job seeker (versus the typical resume) to assess a good job fit.

Mentioned earlier, the Michigan Inclusion Work Group focused on universal access to One-Stop programs and facilities across the state. With support from Flint, MI, the work group developed a full report with recommendations, highlighting strategies to enhance the system's universality. As a result of these efforts, a systemic approach to ensuring universal access was being integrated into mandatory One-Stop policies statewide.

Discussion

[7] Universal design for the workforce is the design of environments, products, and communication practices as well as the delivery of programs, services, and activities to meet the needs of all customers of the workforce development system.

A key goal of these projects was influencing systems change within their local communities, though many grantees took that challenge even further and worked towards state-level change. The approaches used to influence systems change varied significantly by grantees but were driven by common concepts.

Sites spent considerable time developing local partnerships that helped both provide services to individuals and develop systems that were more flexible and responsive. Initially sites viewed resources from a perspective of shared funding strategies, but as they got to know their partners better they realized that the knowledge and connections they could bring to the table were as critical as dollars. As sites developed an increased respect and appreciation for the expertise of their partners, they were able to think more creatively about what was possible, rather than feeling constrained by perceived barriers.

Time was a critical variable that contributed to the relationship development necessary for systems change. In their first year, grants focused primarily on startup activities and partners starting to learn about each other. Information sessions where partners described their areas of focus were helpful in this initial phase. Real partnership began when they started working together around individual customers. Although the grant resources brought these partners together, the improved ability to provide services resulted in real change that would extend beyond the funding. After staff saw a better way to do business, they were less interested in returning to standard patterns and practices.

This initiative also made clear that systems change needs to occur in both formal policies and day-to-day practice. Many sites created formal agreements and MOUs that specified expectations. These could be critical factors in institutionalizing systems change but also ran the risk of becoming a forgotten policy that sat on everyone's shelf but was not actualized. What really accomplished the change was the combination of these formal agreements *and* changes in how staff functioned and worked together.

Additional formal strategies that contributed to systems change were articulating expectations through the RFP process and job descriptions. Since these became the standards by which vendors, operators and staff were to be evaluated, they communicated the priority placed on this effort.

For state-level systems change to succeed, sites found it effective to partner with other like-minded entities and efforts within the state that had similar priorities. In some states these efforts were at only a formative stage, and some projects began working at the ground level on efforts such as getting a state Medicaid buy-in. In other cases, projects drove group efforts and contributed recommendations to the governor and state legislature. Sites also worked with a variety of state agencies to promote policy changes that encouraged the use of Customized Employment and a focus on employment as primary outcomes for all individuals with disabilities within their states.

For effective systems change, sites found that orientation to decision-makers needed to focus more on the intended goals and process of service provision than on the parameters of the grant.

Grants have a tendency to be viewed as time-limited, accompanied by the mindset that “we only need to do this activity with a finite number of people for a finite time." When projects moved away from an emphasis on a specific project and instead communicated a vision of new strategies, decision-makers could view this effort in a larger context and start to see how these strategies might apply to their broader customer basis. Sites that began the education process from this perspective versus trying to move to a systems change focus halfway through the grant were more successful in accomplishing real change.

It was necessary to use a mix of different staff development activities to build the capacity of staff responsible for implementing services. In addition to formal training events, sites used job shadowing and mentoring as strategies to help staff use what they had been trained on. An ongoing system of training and reeducating staff was necessary since with most direct service positions there is considerable turnover. Even staff who had previously taken part in training could benefit from getting a refresher to help reenergize them and add nuance to their approach.

Several sites communicated their commitment to Customized Employment and service provision to individuals with disabilities by setting goals within staff performance reviews and vendor recertification processes. This articulation of expectations sent a strong message and ensured that the priority continued to be prominent after the grant ended.

VII. Sustainability of Grant Activities

Sustaining systems change requires a plan that identifies priorities, action steps, and the resources needed to overcome barriers to long-term change. Although projects varied in the areas they chose to sustain, they applied innovative methods to institutionalize their projects' best practices. They identified key champions to support the initiative, aligned partners with a common vision, and established strong internal systems were in the pursuit of their specific efforts.

Key Findings and Successful Strategies

Multiple Funding Sources

No one partner or funding mechanism is sufficient to meet the needs of multiple customers who each have unique employment goals and support needs. Establishing a way to access multiple funding sources on behalf of customers promoted the sustainability of Customized Employment services.

- Multiple funding streams and agency relationships were necessary for Fairfax, VA to provide the widest range of services required in its community.
- Boston sought funding from multiple systems, such as Department of Mental Retardation, VR, and Department of Transitional Assistance (the state agency responsible for administering public assistance programs), as an approach to sustain service delivery needs in the workforce investment area.
- While working with veterans, Montgomery County, MD utilized funding from the Veterans Workforce Investment Program (VWIP), in conjunction with WIA ITA's, to provide employment services, supports, and training to veterans with significant barriers to employment.
- In Cobb County, GA, project staff worked to leverage resources from multiple streams and sources, including the One Stop Career Center's WIA funded Individual Training Accounts (ITA's). In one instance, a project customer used WIA funded ITA dollars to pay for A+ Certification at a local technical college, while also leveraging grant funding to purchase additional tutoring time with the class instructors each week. He also benefited from the accommodation of being able to audit the A+ class once after completion of his enrollment in order to review the content again. WIA services also engaged VR to support job development services through a local CRP and a customized resource ownership situation was pursued with the support of an Employment Specialist.

Staff Competencies

Grantees found that establishing and maintaining an effective professional development system was a key feature of ongoing sustainability.

- Fairfax, VA found that staff development systems needed to be established if quality services were going to be sustained.
- The innovative strategies that Customized Employment offers, such as discovery, job creation, resource ownership, and supported self-employment, is pivotal to successful

employment for job seekers with significant disabilities. Indianapolis recognized that time and effort be invested in professional development for staff to gain competence in these areas.
- The availability of peer mentors for customers with disabilities in Cobb County, GA resulted in improved support systems for both job seekers and One-Stop staff, providing a beneficial supplement to staff training.

Use of Customized Employment Strategies with Other Populations

As other WIA-funded programs came to recognize the value that Customized Employment services offered to their populations, various agreements and capacity-building activities occurred to expand Customized Employment services to more customers with barriers within the system.

- Fairfax, VA found that the broad applicability of Customized Employment services made it attractive to many agencies, both in and beyond the disability service system
- Customized Employment strategies were utilized with youth transitioning from high school in Knoxville, TN by adapting the grant's Transition Services Integration model.
- In Utica, NY Customized Employment strategies were utilized with the court system in a jail diversion program. Courts used Customized Employment tools to develop employment plans. Treatment courts were also involved with drug-related cases since such charges often involved dual diagnoses, including some type of disability.
- Building off of the innovations led by the Alaska Customized Employment Project, state leaders in the Department of Public Assistance (TANF) and Vocational Rehabilitation, among others, have partnered to offer family-based Discovery and Customized Employment services to recipients of TANF in Alaska.
- In Montgomery County, MD the offender re-entry program saw such value in the methodology used in the Customized Employment process, that they began incorporating its basic principles into employment planning.

Policy Influence

Long-term systemic change can be supported through developing and modifying policies on the local, state, and federal levels. Although it warrants a mention here, please refer to the Section on Policy and Systemic Influence for additional information.

- To promote accountability in sustaining systems change, Flint and Detroit, MI, Hempstead, NY, and El Paso modified One-Stop operator and vendor contract language to include the principles and tools of Customized Employment, as well as universal design strategies.
- The Indianapolis project worked closely with the public VR system to advance policies that promoted self-employment and Customized Employment services, which would continue to drive employment activities beyond grant funding.
- Athens, GA found that the design of the Medicaid buy-in program must account for both the needs of customers and the political realities of cost and stakeholder support.
- To promote greater access to employment options for individuals with disabilities within the county government, Montgomery County MD, the LWIB, and Customized

Employment staff worked collaboratively with the Office of Human Resources (OHR) to create a Customized Employment initiative. As of this writing, OHR has decided to work with a local intermediary to: identify job tasks/create job descriptions based on current county workforce needs; and recruit qualified job candidates with disabilities from the Public School System, CRPs and the One Stop Career Centers to fill these new positions.

Redesigning System Infrastructure

Grantees recognized that significant systems change was necessary to efficiently and effectively meet the needs of a broad customer base. Considerations were made for designing a One-Stop infrastructure to manage the system-building process to limit handoffs and redundancies, address decisions around customers in a more unified way, and promote collaboration within the system.

- Benton-Franklin, WA found that lasting change was not likely to be sustained unless infrastructure (training, referrals, and funding) was institutionalized.
- Examining the existing service delivery structure in El Paso allowed the project to identify roles and functions that aligned with Customized Employment. Staff functions could then be expanded to allow for the provision of Customized Employment services.
- Projects in both Alaska and Detroit conducted process-mapping activities. Subsequent systems modifications included mechanisms for streamlining service systems and establishing collaborative service delivery teams for customers with barriers to employment.

Leadership

Grantees that elicited buy-in from a number of stakeholders at a variety of leadership levels were the most successful in achieving long-lasting systems change and keeping the mission of enhancing employment opportunities for customers with disabilities at the forefront. Having allies and leadership at the local and state levels was also valuable for building trust, credibility, and investment among all constituents.

- Sustainable systems change within the workforce development system required leadership at the WIB level to "champion" the effort. Boston recognized that this champion should have the leadership skills to steer the mission and foster improved coordination and collaboration among agencies both within and outside the workforce development system.
- El Paso found that achieving systems change required board-level investment and commitment. It was critical that values be communicated and concrete steps for effecting change be proposed and supported throughout the process.
- Strong leadership at the state and/or local level was critical to systems' ownership of projects and the recognition of their system as the target of change. Projects in Alaska, Georgia, and Detroit found that an important aspect of sustainable systems change was for recognized leaders to send a consistent, clear message.

Overcoming Obstacles

Continuing Informal Partnerships Beyond the Grant Funding Period

Initiatives that involve service delivery and specific individual outcomes often exist only throughout the funding period. As additional partnerships were formed and innovative service delivery systems established, grantees entered into more formal agreements to sustain collaborative efforts beyond the grant period. These agreements helped ensure that partners were committed to continuing to support job seekers with barriers to employment.

As partnerships within the Nashville project evolved, it was determined that formalizing the relationship would help systematize service delivery processes. The chief tool in pursuing sustainability was Letters of Understanding (LOUs) between the Division of Rehabilitation Services and designated community rehabilitation providers funded through the Mental Retardation/Developmental Disabilities system. These agreements outlined the roles and responsibilities of specific agencies and staff. As no similar support system existed for people with other disabilities, such as mental illness, additional LOUs were explored. Collaboration with the state's disability systems resulted in an LOU between one of the grant sites and one of the state's largest CRPs that supported people with mental illness. This allowed for the option of long-term supports through numerous other programs.

Similarly, multiple projects modified contracts with One-Stop operators and partners to reflect more individualized service delivery. This communicated an expectation, and often requirement, that operators meet the needs of all customers. El Paso, for example, utilized policies and contracts as a mechanism to ensure that quality service delivery processes remained in place beyond grant funding. The RFP for the One-Stop operator included specific language to ensure that customers with disabilities had access to services and that the system had the capacity to deliver quality employment services.

Systemic Barriers to the Development of Self-Employment Opportunities

Innovative entrepreneurial opportunities proved effective in creating meaningful employment for many project participants. Yet specific workforce development and VR policies did not fully support the establishment of such businesses. Grantees influenced systems in various ways to promote the option of self-employment for job seekers with disabilities.

In Indiana before the grant, self-employment options had been limited for customers of both state public VR and One-Stops who had significant disabilities. For example, job coaching supports were not accessed for individuals in self-employment. Through education, policy exploration, and leadership, Indianapolis VR established a small business representative position. As of this writing, a pilot was being conducted in which VR collaborated with the local One-Stops to assist its customers who were interested in starting their own businesses. Grant staff also examined RSA policy directives for coding various employment outcomes. As a result of these efforts, VR created a new line item code under supported employment services titled "supported self-employment." VR now supports entrepreneurs with disabilities to achieve their goals, with creative funding to support startup costs and job coaching needs.

Similarly, WIA funding was accessed in Indianapolis to allow customers the training they needed in specific areas to begin their small businesses. The demands on the system, continual funding reductions, and pressure for outcomes—with self-employment outcomes being particularly complex—created challenges to providing the support individuals could need to start a business. For these reasons, One-Stops did not have the knowledge or resources to support such goals. Education and support was provided to the system regarding ways to use WIA training dollars to provide entrepreneurial skill development.

As with many projects, Cobb County, GA project staff experienced an ongoing progression in their relationship with VR and the agency's openness to providing flexible funding for self-employment. This process required relationship building and training, project staff reported. Initially, the concepts of self-employment and resource acquisition were almost entirely foreign to VR staff. However, after seeing multiple successes under the grant, VR eventually became more open. Project staff also reported that willingness to commit resources to self-employment projects varied by counselor. Although state "policy change" per se had not yet been achieved, the practices of individual counselors changed significantly. This provided further evidence that barriers assumed to be rooted in policy are often in fact created by habit, assumption, and practice.

Keeping the Employment of People with Disabilities on the Radar

As project activities and influence were time-limited, grantees faced the challenge of how to maintain disability as a priority at the LWIB level. In response, grantees established disability subcommittees within their local boards. In El Paso and Detroit, subcommittees advised the LWIB on the Customized Employment project, program service sustainability, and employment issues such as recruiting, hiring, and training opportunities for individuals with disabilities. These disability councils were comprised of members of their respective consortia. Targeted areas included ensuring equal opportunity and access to the system; developing relevant policies (e.g., accommodations, assessments); and identifying new or ongoing community initiatives concerning the employment of people with disabilities.

Promoting Staff Competencies

Customized Employment is a new and different way of providing employment services, particularly for the workforce development system. To sustain quality services, it is essential to have ongoing mechanisms to ensure that staff members have the knowledge and skills to meet the needs of job seekers with various barriers to employment. The Indianapolis project provided training on Customized Employment and disability issues approximately once per month throughout the grant period to One-Stop staff and community partners (e.g., mental health centers, local school systems, community rehabilitation providers). Since then, partners have begun to incorporate Customized Employment trainings into the current statewide Supported Employment training program.

Online modules also provided a mechanism for ongoing training. In Frederick, MD a number of experts convened through the project created an e-Learning center. These modules covered topics such as Customized Employment, Social Security work incentives, and interviewing and

hiring people with disabilities. They provided an easy and sustainable way to ensure ongoing staff training in spite of high turnover, low training budgets, and limited staff time.

The University of Georgia, a Cobb County project partner and another ODEP grant recipient, also created an online job developer training with much of the key information available on an ongoing basis. These online trainings were open to the public, and were widely distributed throughout the state. Each module was designed for both accessibility and universality. They offered a wide range of interactive learning opportunities to explore given issues in depth, with a skills test at the end of each module.

Additional methods were used in Cobb County, GA to promote competencies within the system. For example, project staff accessed archived information available for no charge through Virginia Commonwealth University and other organizations. The LWIB staff also developed videos, interviews, and multimedia presentations to use for staff training, media outreach, and outreach to partners.

As training in and of itself is often not sufficient to develop the required competencies, the Athens, GA project also provided considerable technical assistance to community providers throughout the state. Customized practices require intensive, hands-on training and oversight to instill in another system. They also require a system of partnerships to surround and support the services.

Shifting Perspective from Pilot Project to Broader Systems Change

The demonstration activities of the grantees provided a laboratory to identify and address local and state policy concerns. By demonstrating effective strategies to improve employment outcomes for individuals with disabilities, sites moved the disability employment agenda forward in various systems, including state workforce development, state departments of mental retardation, and Medicaid.

Athens, GA expanded on the foundation built through grant activities to achieve more than a special project could accomplish alone. The partnerships formed through these activities were expansive, ranging from One-Stop staff to statewide disability agencies to Protection and Advocacy projects. These partners pulled together to form “The Employment First Institute," intended to perpetuate and enhance many of the grant’s original goals. The initiative was based on a statement of intent endorsing customized practices and employment for people with disabilities developed collaboratively through the efforts of the grant. The formal goals of the institute are:

- Create, sustain, and disseminate innovation and innovative practices
- Work with systems and policies to improve outcomes
- Provide technical assistance to, and potentially assist in creating, community providers
- Transform attitudes and perceptions
- Provide leadership in connecting innovative work

In addition to having an impact on the local workforce development system, Flint, MI was able to influence the state level through an initiative to enhance accessibility for all individuals

seeking services at One-Stops. As a culmination of this yearlong initiative, Michigan established a statewide One-Stop Center inclusion work group comprised of the state VR director, Career Alliance, Inc. CEO and board chair, and staff from the Department of Labor and Economic Development, the Customized Employment project, Detroit Workforce Development, and other collaborative entities. This work group focused on universal access to One-Stop programs and facilities across the state.

The Flint project provided information and resources related to universal design strategies within the workforce development system developed by the National Center on Workforce and Disability/Adult and its partners. The work group developed a full report with recommendations highlighting strategies to enhance the universality of the system. As a result of these efforts, a systemic approach to ensuring universal access was being integrated into mandatory One-Stop policies statewide. The Michigan Works! Association was slated to provide a self-assessment checklist for the Michigan Works! One-Stops. Subsequently, biannual site reviews would utilize this checklist to further assist the One-Stops in achieving equitable service and outcomes.

Both Tennessee and Georgia explored Medicaid systems as a means of promoting employment for residents with disabilities. Athens, GA worked to craft and secure the passage of a state Medicaid buy-in initiative. This effort is, of necessity, carrying into the next year of the grant's activities. However, to date, much progress had been made by state representatives. For example, the state Medicaid infrastructure was engaged in the process and worked closely with state leaders to craft the buy-in language. Many major choices were made in regard to language, including income limits, co-pays, and uptake rates. The efforts of state partners secured buy-in from many partners, who have begun to craft a policy that is both highly effective and works with the political and fiscal limitations of the state.

Knoxville, TN also realized success with the state Medicaid waiver program. They was able to provide on-the-job supports by using ongoing extended funding through the Division of Mental Retardation's Medicaid waiver. This provided an example of how Medicaid funding could be adjusted to allow the use of funds for integrated employment instead of sheltered work.

Establishing a Design for Sustainability

Many grant-funded initiatives are considered pilot projects. Despite the time-limited nature of the Customized Employment funds, grantees designed their projects to maintain services and benefits via a sustainable process.

The Detroit project addressed sustainability throughout every phase, from planning to implementation. A sustainability think tank met for a series of working sessions to address service delivery architecture (customer flow), employer and provider strategies, consumer and family involvement, and policy issues that hindered or fostered sustainability. The group identified lessons from project experiences; benchmarks for progress; the value of the project's achievements with regard to the impact on people with disabilities; and strategies to sustain, refine, or create new approaches.

In Alaska, sustainability teams handled issues surrounding staff training, partnership, service funding, and capacity development. These groups were charged primarily with sustaining Customized Employment practices—primarily discovery—within a given area's workforce development system. By training and coordinating with community providers, these One-Stops, in collaboration with funding from VR, planned to continue to offer Customized Employment practices through their overall network of resources. Leads and relationships with employers were in place to further formalize the business outreach teams that allowed employers a single point of contact with the system.

This movement in Alaska represented an important finding for One-Stops nationwide that struggled to incorporate the work of community groups into their efforts. Community agencies in this case have unique advantages in that they can maintain a highly flexible style in serving customers. This is an essential element for sustainability, as customized services require considerable community outreach and activity.

Benton-Franklin WA had a workforce integration committee comprised of WIA contractors (adult and youth), Employment Securities staff, One-Stop staff, disability providers, and VR. The committee broke into five work groups to handle policy, pathways, staff training, technology, and marketing. Each committee was charged with identifying and recommending actions regarding the policies, procedures, and practices necessary to effectively integrate services to customers with disabilities into the daily operation and service delivery of the workforce system. Due to the potential impact of these policy issues, the One-Stop oversight committee established a permanent subcommittee.

Meeting the Employment Needs of Diverse Populations

Customers with disabilities are but one segment of the diverse populations served through the One-Stop system. Systems struggle to meet the needs of customers with complex barriers to employment. As with curb cuts and electronic door openers, Customized Employment strategies became recognized for their benefits to the broader population. Grantees worked with mandated and non-mandated partners towards adopting Customized Employment solutions with the customers they served.

Alaska implemented a Customized Employment model with Department of Public Assistance recipients. Under this model, program staff developed service teams, conducted assessments using the discovery process, developed profiles, and negotiated individual jobs with employers. The Department of Public Assistance funded these services based on the success of the Customized Employment project. Furthermore, family dynamics and involvement were quite influential in these efforts; therefore, family discovery assessments were conducted and considered in the overall planning process.

In Utica, NY, staff worked with the courts towards the development of a jail diversion program. Using the tools of Customized Employment, employment plans were developed for individuals at risk of being incarcerated. The treatment court was also involved in cases of drug-related charges—many of which involved dual diagnoses. Individuals' Customized Employment

planning teams are comprised of a case manager from the resource center, the disability program navigator, substance abuse services, and potentially legal aid.

The Veterans' program in Frederick and Montgomery Counties, MD also adopted Customized Employment principles and strategies. The barriers that many veterans may face, including disability, long-term unemployment, mental health issues, homelessness, and addiction, require a more individualized approach to employment planning. The discovery process, emphasis on contributions to employment, and individual negotiation with employers created new opportunities for customers in the Veterans' program.

Time-Limited Funding

Projects built foundations through the financial and technical resources provided by the grants. Though not an answer in its entirety, the quest for ongoing funding to support grant efforts was necessary. Grantees have looked to a variety of sources to expand on their projects' accomplishments to date.

As a result of this effort, the state of Illinois was awarded a Johnson & Johnson Foundation grant to fund a year of planning and infrastructure development to create incentives and expertise for supported employment as a sustainable service. As an expansion of supported employment, staff anticipated that the lessons learned through this Customized Employment initiative would have a direct impact on service sustainability. Project staff were working with the state partners to develop models for sharing costs when two state agencies provided services for joint customers. The Chicago project planned to then adapt this model to assist in sharing costs between the state and city agencies. This was creating additional funding options for individuals with mental illness. Additionally, staff worked very closely with the state representative and chair of the Department of Human Services appropriations committee to discuss options for funding project activities.

Negotiations with the state VR program in Indiana resulted a one-year extension of the Customized Employment initiative. An agreement was made to continue with state VR funding, which would cover administrative costs, Customized Employment services data collection, and provider training activities. Through the purchase of service agreements that had already been established, providers would continue Customized Employment services for VR clients. This extension created additional opportunities to explore the expansion of the results-based funding system within VR to include a tier for more intensive Customized Employment approaches provided by approved Customized Employment vendors.

The collaboration between Cobb County, GA and the Georgia Microenterprise Center was a compelling model for reproduction in other areas. A key element that was most notable for sustainability was the use of low-interest loans. Traditionally, these loans had not been successfully accessed by customized self-employment ventures, as there was very little connection between these two fields. Access to these loans was highly beneficial to the customers who qualified. This model compelled the Cobb/Douglas Community Services Board to provide a similar service based on a foundation they were in the process of establishing. With

enough capital, the board would be able to create a revolving loan pool to provide the flexible funding that was the key to the success of many of the project's efforts.

Discussion

Moving forward with systems change required not only a clear sense of what would change after the grant but also a strategy for implementing and sustaining these changes. A number of key factors contributed to successful sustainability, many of which structured the outline for this document: building partnerships, the systemic leveraging of resources, creating strong internal service delivery systems, and influencing policy and systemic change.

Key factors that changed systems were effective leadership and project management. Successful project leads were able to maintain a focus on longer-term goals rather than getting lost in the day-to-day challenges of project implementation. The initial bridging of the workforce development and human services systems created a common ground to build from. Critical to sustaining elements of the projects was the ability to work effectively with the broad and diverse set of stakeholders and partners who supported job seekers with disabilities.

Furthermore, the more project management elicited the support of other leaders and the larger community, the more the goal of improving employment outcomes spread. When project leaders invested in expanding partnerships and securing the support of key senior decision makers at the local and state levels (e.g., elected and appointed officials, key state and LWIB staff, key staff working within primary agencies), policy change, system engagement, and systems enhancements followed. Communicating the project's vision and successes also elicited broad-based community support.

Grantees agreed that taking the time to build a foundation for solid relationships was critical. The partnership-building process prepared them to move an agenda forward when the time was right. Many grantees, for example, worked on building relationships for over a year before incremental systems change began to materialize. Cross-agency partnerships were required for the system to effectively meet the needs of its customers. Grantees faced both the challenge and opportunity of working with nontraditional partners to agree upon a common set of outcomes and approaches. Multiple grantees realized successful collaborations involving the Department of Labor, human services organizations such as mental health and state VR programs, the Department of Education, and nontraditional partners such as faith-based organizations, small business administrations, and court systems. Although the configuration of relationships varied greatly, capitalizing on partnerships that could contribute to setting and achieving outcome-oriented goals contributed to sustainability.

Two key elements to success were establishing a clear and mutual vision among partners and developing a viable plan for sustaining specific aspects of the initiative. Systems change efforts began with common values or, in some cases, a shift in values. In most cases, partner programs and WIB leadership shared and embraced this vision. Clarifying the value added by Customized Employment set the stage for developments that often manifested in shared agreements and formalized partnerships. Over time, partners strengthened relationships, made further investments, took more risks, and established trust as the foundation for sustaining efforts. As

projects evolved, partners reached a mutual understanding and definition of the specific grant elements that they wished to sustain.

Although the DOL/ODEP initiated the grants, it was not the long-term fiscal supporter. Effective leveraging of the necessary political, technical, and regulatory resources increased sustainability. In relation to the historical timeline of employment services, Customized Employment practices are in their infancy. Grantees struggled to identify the types of financial resources necessary to sustain their work. Some areas successfully redirected or reallocated funding for LWIBs and One-Stops to use with customers with disabilities. Redirecting resources, and braiding and blending funding in new and creative ways on both system and individual levels, allowed grantees to use non-categorical, flexible funding from a variety of public and private sources. Various approaches—such as offering incentive funding pools that prompted investment from other sources, using individualized accounts under the control of the consumer, and creating service collaboration teams—resulted in continuing partner investments and the demonstration of effective practices for sustainability.

Sustaining Customized Employment practices within the workforce development system was achieved by those grantees that examined their service delivery infrastructure for points of alignment with Customized Employment strategies. These grants identified the most natural alignment of functions and targeted specific roles within the One-Stop for change. Through leadership support, intensive technical assistance, and quality assurance monitoring, systems adopted new ways of providing employment services. Only through true ownership and investment by WIB and/or One-Stop leadership can these services be sustained, since continuous quality assurance mechanisms are needed to minimize the likelihood of what may be a natural tendency to resort to "business as usual."

The extent to which grantees influenced policy and systemic change was proportional to the extent to which systems viewed themselves as the target of change. This perception and sense of ownership was conveyed to constituents across all grants. Grants communicated that customizing services and using the tools of Customized Employment were an expectation of service provision. To achieve systemic change beyond the funding cycle, sites integrated these expectations into their One-Stop operators' Requests for Proposals and/or Memoranda of Understanding. This contract language promoted higher expectations for and accountability of WIA vendors. Regulatory mechanisms, such as monitoring systems and quality assurance checks, were also necessary to bridge the gap between policy change and actual practices. Significant systems change required more than simply modifying procedures. Sites had to institutionalize changes to promote a comprehensive and seamless service delivery model.

Sustainability planning at the onset the project proved the most critical element. The projects that considered how each activity/effort would be sustained beyond the funding period achieved more enduring change. In some cases, project goals were somewhat confused or projects lost focus on the systems change aspect as demonstration activities ensued. Thus, developing long-range plans for what projects wanted to accomplish was a key strategy for maintaining focus for the well-defined sustainability team. These teams focused primarily on working through current efforts, challenges, and barriers, including potential conflicts with other initiatives, priorities, and agendas. They developed effective strategic plans to incorporate a clearly articulated vision of

the desired results, strategies for leveraging the needed resources, and necessary support from key champions and decision-makers.

Program Delivery Models and Impact on Sustainability

Program design and project experiences set the stage for what elements grantees chose to sustain. Various factors influenced the ways that projects were initially designed, including the unique needs of the system; existing partnerships—or lack thereof—with the disability community; and the primary author of the proposal. Three basic project designs emerged, based on how significantly the workforce development system was the locus of activity and the perceived target of change. These designs are described in Section I of this report.

Furthermore, the year in which the proposal was written had some impact on the direction and intent of the project. The initial round of grantees did not have the benefit of the clarity around Customized Employment that subsequent grantees were afforded. The first year of the initiative was truly a learning experience, as little was known about the interface and opportunities of Customized Employment within the workforce development system. As a result, the emphasis was less on the actual practices of Customized Employment and more on systemic influence, which reflected the local needs and characteristics of each project. For example, projects may have proposed to enhance the capacity of the One-Stop system to serve customers with disabilities through staff training, partnering more with the disability services system, and/or developing disability-related One-Stop policies. As the advantages of enhancing systems through Customized Employment and the most effective access points became clearer, second- and third-round applications generally were more reflective of specific Customized Employment strategies and the methods for infusing these tools and opportunities into One-Stop systems.

In many cases, this program design acted as a blueprint for the priority areas of focus and, thus, desired areas of sustainability. Some projects shifted focus in response to these experiences and lessons learned throughout the process, but the majority held true to their initial intent. These priorities, typically originating from the seeds planted within program design, frequently acted as the driving force for determining which elements would be sustained beyond project funding. For example, a proposal written by a CRP that emphasized creating self-employment opportunities by blending of workforce development system and other resources would likely focus on enhancing partnerships to promote self-employment, amending policies that impeded entrepreneurship, and establishing mechanisms to braid resources to maintain these services. Conversely, a second-round grantee, armed with a clearer vision of how Customized Employment could be effectively used in the system, may have proposed to influence not only policies but also the roles of One-Stop staff to incorporate and adopt the practices of Customized Employment. This would require a stronger commitment by the WIB and partners at the onset.

In addition to the array of benefits realized and sustained in each locale, these projects acted as *experiments* that identified and demonstrated key ways to enhance the public workforce system's capacity to serve customers with a wide range of complexities, abilities, and barriers to employment. The information elicited and highlighted in this report can fuel future research projects targeted in response to these findings, which would continue to improve the effectiveness of this system.

Appendix A
Grantee Descriptions

Year 1 2001 Customized Employment Grants

Cambridge, MA: Metro North Regional Employment Board
The Metro North Customized Employment Project was based in two One-Stops and administered by the LWIB. As such, it was rooted entirely in the WIA system. The project employed two specialists (one for each site) and used a significant amount of training and technical assistance to bring awareness and expertise on disability issues to the One-Stops. Collaborations with significant service partners such as VR and Mental Health were strengthened, often resulting in joint case management.

Napa, CA: Project Inclusion
The project encompassed Napa, Solano, and Sonoma counties. Project Inclusion focused on two specific goals: to increase employment opportunities and earnings for people with disabilities who obtained jobs through the One-Stops and to increase the system's capacity to serve people with disabilities by embedding Customized Employment strategies into the policies and practices of the local One-Stops and their partners.

Cobb County, GA: Project Exceed
Project Exceed was awarded to a collaborative inclusive of CobbWorks, Inc., a LWIB, and the Cobb County Community Services Board (CCSB). Project Exceed served a diverse customer base with a variety of economic, social, racial, and disability characteristics in customized employment. Project staff provided direct services to grant participants through a grant-based Individual Account (IA). These funds were distinct from WIA-funded ITA's, and designed to be entirely flexible. The project worked within the local One-Stop system, CobbWorks!, Inc., to support and implement change that supported universal access.

Anoka, MN: Anoka County's Transition and Customized Employment Program
For the FY 2001 grant year, the Anoka County Workforce Council, in collaboration with the local One-Stop, planned, developed, and implemented a comprehensive adult transition and Customized Employment model for extended-time high school students, ages 18-21, who had significant disabilities.

Knoxville, TN: Tennessee Customized Employment Project
Workforce Connections, a division of the Knoxville-Knox County Community Action Committee, was awarded a FY 2001 grant to develop a Customized Employment model to be provided through the Knoxville Area Career Center. The project worked to increase the employment rate of people on the state waiting list for VR and Mental Retardation services in the region.

Fairfax, VA: Customized Employment Grant
The Customized Employment grant initiative was a product of the Northern Virginia Workforce Investment Board. The goal of the group was to build the capacity of the local One-Stop Center to use Customized Employment services to increase employment outcomes, choice, and wages

for people with disabilities who resided in Fairfax, Loudoun, and Prince William counties and the cities of Fairfax, Falls Church, Manassas, and Manassas Park.

San Diego, CA: San Diego Workforce Partnership, Inc.
The San Diego Workforce Partnership Customized Employment project was rooted in the One-Stop system. The grant was administered through the LWIB and implemented in the One-Stops throughout the greater San Diego region. Significant effort was committed to strengthening partnerships for sustainability, and to altering policies to make the system more welcoming and effective for job seekers with disabilities.

Year 2 2002 Customized Employment Grants

El Paso, TX: Transition Adjustment and Career Education
Awarded to the Upper Rio Grande Workforce Development Board, this project worked to enhance the capacity of the Lomaland One-Stop Career Center to deliver services to people with disabilities by bridging education and job development with Customized Employment services in the Upper Rio Grande area.

Juneau, AK: Alaska Customized Employment
Though administered in Juneau, the Alaska Customized Employment grant served most of the state including the areas of Anchorage, Fairbanks, Juneau, Wasilla, and Kenai. To this end, the project looked to build the capacity of One-Stops to provide Customized Employment services on a statewide basis.

Benton-Franklin, WA: Success Project
Success Project served 14 counties in eastern Washington State (Benton-Franklin, Tri-Valley WDC, Yakama, Klickitat, and Kittitas counties). The goal of the project was to build the capacity of the local workforce development system to provide Customized Employment services to people with disabilities, with the focus on serving people with cognitive disabilities who were in sheltered workshops and other segregated settings.

Montgomery, AL: Alabama Customized Employment Program
The Alabama Customized Employment Program served the entire state except Jefferson and Mobile counties. Project goals included having a minimum number of individuals obtain competitive employment as well as for some individuals to receive intensive training and technical assistance on microenterprises, micro-boards, supported entrepreneurship, cooperatives, and small businesses.

Detroit, MI: Detroit Partners for Customized Employment
The Detroit Workforce Development Department was awarded this Customized Employment grant in FY 2002. As the implementing agency, Goodwill Industries of Greater Detroit worked with the system to create flexible service strategies and business solutions through training, education, and the development of a holistic, consumer-directed model for job seekers with disabilities.

Hempstead, NY: Whatever It Takes
The Town of Hempstead Workforce Investment Board used the funding to enhance seamless and quality employment services for people with disabilities through the One-Stop Career Center, serving the town of Hempstead and city of Long Beach. Abilities, Inc., a local community rehabilitation provider, was the primary grant activity implementer.

Richmond, VA: Richmond Customized Employment Project
The grant worked to strengthen the linkages of the Richmond-area One-Stop system with schools, VR, and the Virginia Business Leadership Network, a business-directed group designed to encourage other businesses to hire people with disabilities. The project focused on expanding the reach and scope of existing service programs, such as a WIA youth project, to make them more appropriate for job seekers with multiple barriers.

Indianapolis, IN: Indiana Customized Employment Grant
The Indianapolis Private Industry Council received funding to enhance employment opportunities for job seekers with disabilities through three One-Stop Career Centers. A primary focus of the project was supporting individuals in developing small business ventures.

Year 3 2003 Customized Employment Grants

Chicago, IL: Chicago Workforce Board
The Chicago Workforce Board worked to enrich the capacity of local One-Stop Centers to provide Customized Employment services to individuals with serious mental illness who had not previously been targeted by the One-Stop system. The project took on a systematic review of One-Stop policies and practices with the intention of incorporating new policies and evidence-based Customized Employment practices throughout the state.

Montgomery County, MD: Montgomery County Workforce Investment Board
This grant made use of partnerships between local, state, and national organizations to expand the capacity of the Montgomery County Maryland One-Stop Center to serve people with significant disabilities. The partners worked to blend and braid funds from the workforce development system with funds from other service systems in an effort to serve individuals in a coordinated and effective fashion.

Utica, NY: Workforce Investment Board of Herkimer, Madison, and Oneida Counties
The project targeted individuals with disabilities living in group or community home settings, individuals who work in segregated day programs, and individuals in supported housing programs. The initiative demonstrated the benefits of using supported entrepreneurship, individualized job development, job carving, job restructuring, personal agents, microenterprises, and individualized funding to increase consumer choice and control in Customized Employment outcomes.

Flint, MI: Customized Works!
The Genesee/Shiawassee Workforce Development Board was awarded funding to better serve customers with disabilities through the One-Stop system. Implemented through Michigan Works! Career Alliance, this project focused on two One-Stops in the service delivery area.

Helena, MT: Montana Job Training Partnership, Inc.
The project designed to provide outreach and marketing to persons with significant disabilities about the services available through the workforce development system, with an emphasis on Customized Employment services. An important and innovative role of this project was to demonstrate how to implement Customized Employment strategies in a rural region.

Year 2 2002 Olmstead WorkFORCE Action Grants

Boston, MA: Massachusetts WorkFORCE Action Grant
The Institute for Community Inclusion at UMass Boston was awarded funding to build the capacity of local One-Stop Career Center staff, community providers, and public human service agencies to provide Customized Employment services to individuals covered under the Olmstead decision. Implementation sites included the Quincy Career Center and CareerPoint in Holyoke.

Peoria, IL: An Innovative Supported Employment Program for People with Serious Mental Illness
Goals for the Peoria project included generating information on how workforce development programs can meet the needs of individuals with psychiatric disabilities, and training One-Stop Career Center staff in Peoria on how to meet these needs.

Athens, GA: Jobs for All... An Olmstead Initiative
Jobs for All was designed to increase the number of people with disabilities in non-stereotypical, customized job settings by using a multi-agency, person-centered approach that focused on the efficient coordination of services across agency and departmental boundaries. Techniques used to accomplish this goal included maximizing customer choice through flexible funding, and using customer and peer supports. This project focused on the dissemination and implementation of an "employment first" philosophy in the State of Georgia.

Year 3 2003 Olmstead WorkFORCE Action Grants

Nashville, TN: Tennessee Olmstead WorkFORCE
The Nashville project sought to document the stories of individuals who used Customized Employment strategies to transition from segregated environments to community employment. The project worked to expand the capacity of the Tennessee One-Stop system by including disability employment partners to provide services for job seekers with significant disabilities.

Vancouver, WA: Columbia River Mental Health Services
This project worked to assist individuals with psychiatric disabilities to obtain employment in competitive and Customized Employment situations. Project partners included the One-Stop system, CRPs, mental health providers, developmental disability organizations, and faith- and other community-based organizations.

Frederick, MD: Maryland WorkFORCE Promise
This project created a coalition of 20 partner agencies and organizations to provide Customized Employment services to individuals with developmental and psychiatric disabilities who were in

segregated day activity, sheltered work, and public institutions. Strategies the project enacted included partnering with the One-Stop system, demonstrating best practices in follow-along supports, increasing employer involvement, and offering benefits counseling.

Appendix B
Glossary of Acronyms

BPAO	Benefits Planning Assistance and Outreach
CARF	Commission on Accreditation of Rehabilitation Facilities
CRP	Community Rehabilitation Provider
DOL/ODEP	Department of Labor, Office of Disability Employment Policy
ITA	Individual Training Account
LOU	Letter of Understanding
LWIB	Local Workforce Investment Board
MOU	Memoranda of Understanding
NCWD/A	National Center on Workforce and Disability/Adult
ODEP	Office of Disability Employment Policy
OHR	Office of Human Resources
PASS	Plan for Achieving Self-Support
POSA	Purchase of Service Agreements
RFP	Request for Proposal
RSA	Rehabilitation Services Administration
SSDI	Social Security Disability Insurance
SSI	Supplemental Security Income
TANF	Temporary Assistance for Needy Families
VR	Vocational Rehabilitation
WIA	Workforce Investment Act
WIB	Workforce Investment Board
WIPA	Work Incentive Planning and Assistance