



SOUTHEAST TACE: IMPACT OF INNOVATIONS PROJECTS ON VR ADOPTION OF EMERGING PRACTICES 2009-2012

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Overview: Since late 2009, the Southeast TACE has been partnering with a number of state vocational rehabilitation (VR) agencies to integrate innovative practices within the VR service delivery mainstream. Several states are piloting or integrating approaches such as customized employment and asset development to help improve employment and self-sufficiency outcomes for individuals with disabilities. Five of these “Innovations Projects” have progressed to a point where their impact can be assessed to inform future action at local, state and regional levels. To that end, TACE has worked with project teams to evaluate their individual experiences as well as the Innovations initiative as a whole, in terms of impact on the adoption of best practices within VR systems in the Southeast. This report describes the activities and outcomes of the five projects and presents preliminary observations about their impact on states’ adoption of emerging employment practices.

Methodology: To assess the first two years’ impact on VR adoption of emerging employment practices, the Southeast TACE team looked at five projects where at least the initial implementation phase had been completed and measures were being considered or taken to integrate the practice into VR operations. The team analyzed information from source documents and structured interviews, then prepared draft reports for each project. These drafts were then approved by project leads and summarized in a composite discussion paper. A focus group of project leads reflected on the paper and identified common themes, recommendations and future needs across projects. Results of the focus group discussion are incorporated here and are being built into the continuous improvement of the Innovations initiative and the design of future TACE activities.

I. Rationale

VR agencies are seeking strategies to improve their effectiveness in obtaining employment outcomes for individuals with the most significant disabilities. Multiple needs assessments conducted by Southeast TACE point to a gap in the capacity to serve this population. Traditional client assessment and job development models, as well as wholesale, top-down change efforts, have not proven effective. VR agencies are also faced with decreasing resources, increased caseloads and staff turnover, further straining their capacity to serve individuals with the most significant disabilities.

Recognizing that it takes significant change in practice and systems to build this capacity, the Southeast TACE proposes an incremental, pilot project strategy. Through “Innovations” projects, agencies introduce employment practices proven effective in other domains but as yet untested in the southeast VR setting. With TACE resources and other supports, VR agencies pilot test the selected practices. They have the opportunity to try out the practice, change policies and make other adjustments in a controlled process with informed, data-driven input from stakeholders at all levels. TACE believes this approach provides a platform to address systems issues, secure buy-in and develop plans to phase in, fully adopt and sustain the practice in order to measurably improve outcomes for jobseekers with the most significant disabilities over the long term.

II. Process

To help states introduce or integrate effective practices into their service portfolios, Southeast TACE invites agency leaders to propose projects that will meet their organization’s needs and lead to improved performance and outcomes. TACE works with them to identify a practice or strategy, learn it and embed it in policy and operations. The identified practice or strategy represents a distinct change or advance for the VR agency, and the project may involve building new skills, adjusting policies or regulations or negotiating new partnerships in order to accommodate the practice. Each project takes a phased approach, typically starting with a pilot test and progressing to replication and dissemination. Timing and design are dictated by such criteria as:

- VR leadership and partner commitment.
- Staff resources adequate to engage in the initiative and collaborate with the TACE team.
- Clearly defined project goals and outcomes in terms of integration and sustainability.
- Potential linkages to other innovative activities underway in the state.

III. Status

Southeast TACE is currently partnering with seven agencies in five states to plan and implement ten projects designed to assist VR and partners, including community rehabilitation providers (CRPs), in adopting practices that will help them improve employment outcomes for jobseekers with the most significant disabilities. Five of the projects are far enough along to be included in this evaluation, having completed a training or pilot phase and begun taking measures to more

fully integrate the practice into mainstream VR or partner operations. These five projects focus on the adoption of Customized Employment (CE) to improve capacity to work with jobseekers with the most significant disabilities. The additional five projects have been initiated recently: two focusing on asset development and three on aspects of Customized Employment. Information on the individual projects included in this evaluation is summarized below.

**Summary of Evaluated Projects
 (as of October 2012)**

PROJECT	OBJECTIVE	DESCRIPTION	ACTIVITIES	OUTPUTS/ OUTCOMES	SUSTAINABILITY
FL- DVR Transition - Customized Employment Nov. 2009 – Aug. 2010 <i>Leads/ Partners:</i> -DVR -School Districts	Develop a consolidated “way of work” among partners to increase customized employment outcomes for youth with the most significant disabilities.	Training & TA to pilot a model for multiple agencies to work together using the CE process to serve youth with most significant disabilities.	Intensive training of teams of Transition Counselors & educators working with a jobseeker.	2 Transition Counselors and 4 educators used CE to seamlessly transition five students between education and rehabilitation systems. 3 jobseekers offered customized jobs. Small community of practice; 1 Transition counselor promoted to CE liaison position. Generated info for subsequent CRP capacity-building project.	Data & findings used to inform subsequent project to train and credential CRPs in Discovery. Collaboration with Exceptional Student Education Teachers at classroom level is recognized as best practice; continues to be endorsed by VR.
MS- MDRS Customized Employment Sept. 2010 – Present <i>Lead:</i> MDRS	Build MDRS capacity to use CE to improve employment outcomes for jobseekers with the most significant disabilities.	Train interested VR staff to use the CE process; statewide implementation (no pilot).	Intensive training of 40 self-selected staff, working in teams with a jobseeker; Focus Group assessed progress, proposed next steps.	10 VRCs now use CE; 10 jobseekers placed in jobs, 10 more are in customized job development. Focus group team provides ongoing mentoring/ support. CE & Discovery identified as discrete VR svcs.	Code changes for CE & Discovery. Formalized community of practice of CE practitioners/ mentors within VR. MDRS is considering next steps to institutionalize CE.
FL- DVR Discovery Certification Nov. 2010 – Present <i>Leads/ Partners:</i> -DVR -MG&A -U. of So. Fla. -FL Agency for People w/ Disabilities (APD)	Increase utilization & quality of Discovery services for individuals on Medicaid Waiver list.	Develop & test a performance-based Discovery certification prog.; further develop DVR infrastructure (policies, fees, roles, etc.) to begin implementation of Discovery for VR-referred jobseekers.	Development of certification model (course content, certification criteria); instructor training with CRPs; focus group; online course pilot; infrastructure measures; assessment of implications for VR and partners; determination of next steps.	10 Discovery-certified CRPs; provisional fee code for VR to purchase Discovery services; 10-week online certification course; 16 VR-referred jobseekers with Discovery-informed employment plans, 12 additional VR referrals; partnership with APD for referrals and funding of long-term supports.	Provisional VR fee code to purchase Discovery from CRPs in pilot; 10 certified CRPs; data being analyzed to determine next steps for statewide dissemination of Discovery and further training in the rest of CE.
GA- Customized Employment (Transition & Expansion) Jan. 2011 – Present <i>Leads/ Partners:</i> -GRVA -Employment First GA -Univ. of GA -Interagency	Develop infrastructure to use CE in improving competitive employment outcomes for individuals with the most significant disabilities.	Interdisciplinary committee to pilot use of CE in the VR setting, and identify and address infrastructure needs of VR and partners as a platform for statewide implementation. Pilot with Transition population;	<i>Pilot project:</i> Interagency group facilitation; intensive training for VR & CRP staff; technical assistance to CRPs; dissemination activities. <i>Expansion project:</i> Infrastructure measures (draft policies, service definitions, MOUs); intensive training for VR & CRP staff in a	<i>Pilot project:</i> Strong interagency partnerships, strategies and resource-sharing agreements. 22 staff completed intensive training; 5 VRCs in 4 counties are actively referring jobseekers; trained staff placed 1 VR-referred jobseeker in a customized job; 9 other VR-referred jobseekers receiving CE svcs. <i>Expansion project:</i> 6 staff completed intensive training (incl. 1 VRC); Customized	Interagency committee continues to pursue or finalize sustainability strategies: VR-approved CRPs; DD funding for long-term supports; joint tracking system; statewide outreach/ recruitment strategies; joint tracking system; statewide outreach/ recruitment strategies; university-based certification program. Supplemental

PROJECT	OBJECTIVE	DESCRIPTION	ACTIVITIES	OUTPUTS/ OUTCOMES	SUSTAINABILITY
Steering Committee		expansion project with all populations.	2 nd region; statewide orientations; design of next steps strategies.	Supported Employment created as a VR service with its own fee schedule; 4 VR-approved CRPs; draft VR policy; draft MOUs with MH & DD agencies; outreach strategies to expand pool of providers & sustain skills.	Discovery training for residential assessment facility staff.
KY-OVR/CRP Customized Employment Nov. 2011 – May 2012 <i>Leads/ Partners:</i> -OVR -Univ. of KY	Build pilot group capacity to use CE, act as mentors and foster broader acceptance and utilization among VR and CRP partners.	Intensive training for pilot teams of VRCs and CRPs, each working with a jobseeker. Mentoring & university-based training components being considered.	Development & implementation of intensive CE training for VR, CRP & UK staff; development of pilot fee codes for Discovery & CE; data collection & analysis to finalize fee codes.	Fee for service established for Discovery. 6 staff in 4 provider agencies authorized to serve VR referrals. 1 jobseeker placed in a customized job. New VR leadership training program includes CE skills; completers will be able to refer jobseekers for CE.	Permanent VR fee code for Discovery, and HCBS waiver for long term supports. Sustainability measures (e.g., university-based leadership training) being considered.

IV. Results & Recommendations

A. VR Adoption of Emerging Practices in the Southeast

As a result of these projects, VR counselors in four states in the Southeast have a viable option for serving jobseekers with the most significant disabilities where previously they had no effective option. To varying degrees, each of these states now has trained practitioners and an infrastructure for VR to refer jobseekers for Customized Employment services, as well as a strategy to further integrate the practice going forward. This was made possible by the vision and determination of state leadership to find a way to serve this population, and by their considerable investment – coupled with TACE supports – in testing out an emerging practice in their respective VR contexts.

While the pilots’ preliminary employment outcomes are by definition few in number, they are encouraging enough for these agencies to have deemed it a worthwhile investment. Accordingly, they are proceeding with dissemination, replication and integration strategies to embed the practice in their delivery systems in order to ultimately improve employment and self-sufficiency outcomes for jobseekers with the most significant challenges. Specifically in these states, the impact includes:

Increased Awareness/Understanding/Utilization

- *Awareness:* Leaders, staff, partners, advocates and jobseekers/families are increasingly aware of (even requesting) Customized Employment or Discovery as a credible option for individuals with the most significant disabilities.
- *Understanding:* Leaders, staff and partners understand their common interest in Customized Employment on a cross-systems continuum; they appreciate the difference between Customized Employment and traditional practice, and are able to design/ implement systems changes accordingly; they are willing to open cases that previously might not have been considered, or reopen cases that had been unsuccessful; and they

are able to make referrals, purchase services and agree on process and expected outcomes for more challenging cases.

- *Utilization:* As a result of the above, counselors now have alternatives for working with jobseekers with the most significant disabilities and increased numbers of practitioners have the skills and willingness to invite referrals, apply Customized Employment /Discovery techniques with greater fidelity and achieve improved employment outcomes.

Infrastructure – Policy, Regulations, Capacity-building, Partnerships

Policy/Regulations

- Customized Employment and/or Discovery are endorsed as discrete services in policy or regulation (MS, GA) or VR 3-year strategic plan (FL DVR).
- Fee code changes have been made or drafted in all four states.
- Provisions have been made to fund long-term supports in three states (FL, GA, KY).

Capacity-building

- Internal (VR): Florida DVR has assigned a VR consultant to serve as Customized Employment/Discovery Liaison, and MDRS has a Customized Employment mentor team. Georgia has further invested TACE resources in Discovery training for its residential assessment center.
- External (provider/partner): Georgia stakeholders are engaged in a structured outreach and funding strategy to develop a pool of VR-approved CRPs. Partners in all four states have communities of practice or mentoring strategies. Three states (GA, FL, KY) are testing or considering university-based training or credentialing programs.

Partnerships

- GA: A strong collaboration is firmly established among Georgia Vocational Rehabilitation Agency, Employment First Georgia and University of Georgia. They lead an active, broad-based Steering Committee in continuing to build capacity, broaden participation, track progress and share resources.
- FL-DVR: Structured relationships are now in place with CRPs certified to deliver Discovery services. Improved collaboration with school districts has resulted in earlier youth engagement. The Agency for Persons with Disabilities is now a strong partner in supporting a continuum of services.
- KY-OVR: There are much stronger collaborative relationships with community rehabilitation providers.
- MS: MDRS is discussing outsourcing some employment services, where previously all services were delivered in-house.

B. Highlights, Challenges, Opportunities

Highlights: The most promising aspects of the Innovations initiative

- VR willingness to take risks, i.e., devote resources to something as yet untested in their system, in order to effectively serve jobseekers with the most significant disabilities.
- Systems changes, capacity-building and partnerships that substantially increased the potential for VR and partners to assist jobseekers with the most significant disabilities.
- Affirmation that outcomes were attributable to Southeast TACE interventions, i.e., the observed improvements would not have occurred without these projects.
- Costs of participating in the projects were well worth the return on investment.
- Findings from the pilots formed the basis for various forms of expansion, replication, dissemination, sustainability.
- Acknowledgement that pilots were not meant to test the effectiveness of Customized Employment but to integrate it within the VR context.
- Acceptance of Customized Employment as an option for effectively working with jobseekers with the most significant disabilities: a “tool in the toolbox” for practitioners.
- Theme of VR investing its TACE resources to develop capacity: a pool of practitioners from which to purchase Customized Employment services.
- Recognition of Customized Employment on a cross-systems continuum requiring collaboration and sharing of resources among stakeholders.
- Breaking new ground in the evolution of Customized Employment
 - policies, fees, agreements
 - professional credentialing
 - new “generations” of Discovery, e.g., in a residential setting
 - alignment with or differentiation from other models (e.g., evidence-based supported employment)
- Models, templates and samples to support further dissemination in the VR community.
- Opportunity for Southeast TACE to apply lessons learned in continuous improvement of these and other pilot projects.

Challenges: Aspects of the Innovations initiative requiring special emphasis

- Reinforcing, with all players, that this is about serving a population for whom VR traditionally has not had a successful strategy, so building capacity will take time and effort, and will represent a departure from business as usual.
- Consistently engaging leadership and management commitment, sufficient to support and sustain the project (e.g., even through personnel changes or government restructuring).
- Articulating success measures that can be directly connected to the project activities, as well as the terms/triggers for moving from one phase of implementation to another.
- Project planning to create the environment for a successful pilot, e.g., clarifying/negotiating roles, responsibilities and resources; or sequencing activities so all teams have an assigned case as they go into training.

- Communicating parameters, expectations and implications to stakeholders and participants so they can make necessary provisions in advance.
- Scheduling training to minimize conflicts (e.g., with holidays) and maximize continuity
- Coordinating performance-based training in teams with assigned jobseekers
- Prioritizing resources for face-to-face training/ technical assistance vs. distance learning or conference calls

Opportunities: New possibilities for the Innovations initiative

- Provide clear guidance in adapting the practice to fit local needs and circumstances.
- Create a mentoring capacity for ongoing support.
- Continue to build a track record in the Southeast community to increase VR confidence to open cases for jobseekers with the most significant disabilities.
- Prioritize project management and facilitation resources.
- Use Skype or distance learning platforms rather than conference calls.
- Facilitate interaction among partners and projects (e.g., periodic focus groups).
- Develop a leadership program providing Customized Employment information for administrators.

C. Conclusions & Recommendations

Based on the experience to date, the Innovations initiative has been a highly effective approach to introducing emerging employment practices to the Southeast VR community. The lessons learned are being applied already in supporting these projects and initiating new ones. The Southeast TACE will continue to use this approach in working with local and state partners to advance employment practices for jobseekers with the most significant disabilities.

TACE is available to confer individually with those interested in replicating this approach, but in general would make the following recommendations:

- Invest in a phased approach to introduce a practice that requires systems changes or represents a significant departure from business as usual.
- Ensure that project success measures can be clearly attributable to project activities and agree on how those measures will shape decisions to continue/sustain the effort (i.e., move from pilot to full adoption).
- Commit to a project design customized to identified needs/goals and a workplan that includes all phases (from pilot to evaluation to replication and sustainability).
- Identify strategies to maximize TACE and stakeholder resources throughout all phases and sustain impact beyond the life of the project. Provide project management and facilitation resources to the extent possible.
- Fully communicate expectations and implications to all stakeholders in advance of their committing to participate.
- Develop a network or community of practice among participants across all projects.
- Compile a clearinghouse of materials, samples, templates and testimonials, based on project experiences.

V. Acknowledgements

The Southeast TACE would like to acknowledge the considerable efforts of all the project teams, and commend them for their vision and commitment in undertaking these pilots. They have risked scarce resources and ventured into largely uncharted territory to find ways to serve a population for whom traditional approaches have not been successful. In the case of the five earliest projects, this investment has not only brought promising returns for their own systems but has also contributed to the larger body of VR knowledge and practice.

Many team members carved out additional time to participate in this evaluation effort via interviews, focus groups and review of materials, as noted below:

Florida Department of Vocational Rehabilitation

Jan Pearce	Supported Employment Administrator
Kirk Hall	Transition Administrator
Wayne Olsen	Area Director – Area 3
Judy Dertod	Area Supervisor – Area 3
Jose Rivera	Operations Consultant

Georgia Vocational Rehabilitation Administration & Partners

Christine Fleming	PI/TA Manager, Georgia Vocational Rehabilitation Administration
Nancy Brooks-Lane	Director, Employment First Georgia
Doug Crandell	University of Georgia, Institute on Human Development & Disability, Supported Employment Center of Excellence

Kentucky Office of Vocational Rehabilitation

Carol Estes	(retired) Supported Employment Manager
Teresa Barney	Supported Employment Manager

Mississippi Department of Rehabilitation Services

Tarea Stout	Director, Rehabilitation Services
Cassandra Holly	Program Coordinator, Supported Employment & Deaf-Blind Services
Anna Thornton	Program Coordinator CARF Certification (former Project Lead)

The following Southeast TACE resource consultants provided significant training and technical assistance in the design, implementation and reporting of these projects:

Michael Callahan	Marc Gold & Associates
Ellen Condon	Marc Gold & Associates
Abby Cooper	Kennedy-Douglas Consulting
Cheryl Green	Consultant
Melinda Mast	Southeast Consultant
Norciva Shumpert	Marc Gold & Associates

TACE will continue to work with the evolving network of all of these partners and peers to build a community of practice in better serving jobseekers with the most significant disabilities in the Southeast states.

About the Southeast TACE

The mission of the Technical Assistance and Continuing Education (TACE) Center Region IV (Southeast TACE) is to provide technical assistance (TA) and continuing education (CE) activities that meet the strategic goals and program performance needs of state Vocational Rehabilitation agencies and their community partners in the southeast US. TACE's areas of emphasis are: employment for individuals with most significant disabilities; transition from school to work; executive leadership development and core capacity building for VR agencies and their community partners. The Southeast TACE is part of the Burton Blatt Institute Southeast.

About the Burton Blatt Institute (BBI) at Syracuse University – Southeast

Located in Atlanta, Ga., the Burton Blatt Institute (BBI) at Syracuse University – Southeast serves an eight-state region in the southeastern United States: Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, and Tennessee. BBI Southeast is comprised of two federally-funded projects, the Southeast ADA Center and the Southeast Technical Assistance and Continuing Education Center. BBI Southeast is one of three offices operated by the Burton Blatt Institute (BBI) at Syracuse University, which reaches around the globe in its efforts to advance the civic, economic, and social participation of people with disabilities. BBI builds on the legacy of Burton Blatt, former dean of SU's School of Education and a pioneering disability rights scholar, to better the lives of people with disabilities. In addition to Atlanta, BBI has offices in Syracuse and Washington, D.C. For more information, visit bbi.syr.edu.

Project of the Burton Blatt Institute (BBI) at Syracuse University

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