Customized Employment (CE) Implementation Roadmap

INTRODUCTION:

This roadmap is a guide for planning and providing structure to assist in the implementation and sustainability of the Customized Employment (CE) services within VR agencies, partner state agencies, community rehabilitation programs and other stakeholders. Like all maps, there are often a variety of ways to get from point A to point B, this tool highlights the most common aspects of the Essential Elements of CE. An agency or program can use it to structure its approach in a tailored way, and to plan and achieve sustainability.

PROCESS OVERVIEW:

The roadmap is composed of five (5) distinct components, with each component representing an important leg of the route to successfully launching and improving CE within a state:

I. **Initial discussions and orientation to CE**
II. **Planning for CE implementation**
III. **Project/Program design**
IV. **Project/Program implementation**
V. **Post-Implementation, evaluation, expansion, and sustainability**

Note: Technical assistance staff (including the project lead, trainers, other team members) can walk through the below items with VR leadership in advance of the first meeting and agree on a general design and process strategy that (a) is in alignment with the agency's goals regarding CE implementation and (b) builds upon and leverages existing accomplishments of the agency related to CE.

SECTION I: INITIAL DISCUSSION AND ORIENTATION TO CE

1. Engage in an exploratory discussion with VR on the value of CE in serving people with significant disabilities (including youth and adults) and others with complex employment needs.
2. Engage in a follow-up discussion with VR leadership to determine interest and/or capacity to implement CE in their state.
3. Discuss the process for engaging in a partnership to launch or improve CE services by:
    a. Reviewing the Essential Elements of CE.
    b. Reviewing this complete CE roadmap.
    c. Discussing/Reviewing resources from other states.
4. Identify partners and stakeholders.
(NOTE: items 1-4 above are done through conference calls)

5. Conduct an On-Site Orientation – Introductory Meeting
    a. Orient to CE (based on the Essential Elements): Goal of ensuring a common understanding of CE across all partners.
    b. Develop a vision for CE implementation, and a communication plan.
    c. Determine key partners and roles: Community Rehabilitation Providers (CRPs), Education, Developmental Disabilities Agency, Mental Health/Behavioral Health, and others.
    d. Identify an interagency team for statewide CE design, implementation, and coordination of the CE project.
6. Schedule a full-day (generally on-site) meeting to provide an overview of the CE process for VR agency staff, partners, and stakeholders. Determine next steps for the on-site planning meeting(s). NOTE: The full-day on-site planning meeting is usually preceded by conference calls to prepare for it.

SECTION II: PLANNING FOR CE IMPLEMENTATION

1. Conduct an internal/external environmental scan to identify CE demand, resources, capacity, and service gaps that should be addressed by CE.
2. Design a communication plan.
3. Engage in an on-site implementation planning meeting(s) to:
    a. Review CE for all new/old stakeholders.
    b. Determine the scope of CE implementation (pilot or full).
    c. Determine the capacity of providers by:
        i. Identifying eligible/interested CRPs.
        ii. Reviewing contracting options.
        iii. Examining the need for and availability of training.
        iv. Developing/discussing training capacity for pilot/full implementation.
        v. Addressing provider sustainability.
    d. Determine budget parameters: Are there other funding partners?
    e. Determine the process for choosing CE training providers.
    f. Establish process, tools and roles for supporting evaluation.
    g. Start sustainability planning.
    h. Draft rough project plan.

SECTION III. PROJECT/PROGRAM DESIGN

1. Implement the communication plan.
2. Finalize the project plan, roll out, and timeline.
3. Finalize the budget for the project and contributions from partners.
4. Identify appropriate CE training providers and draft the request for proposals (RFP).
    a. Review proposals and select a vendor for training.

5. Determine process for becoming a qualified provider: What will be required of contractors? (Certification, courses, degrees, other?) Explore other state practices.
6. Determine state VR CE team, stakeholders, and possible contract staff.
7. Determine initial funding and fee structures for services by:
    a. Comparing CE to other funded services within the state.
    b. Comparing your proposed fee with fee structures from other agencies.
    c. Reviewing options for braiding funds with partners (e.g., via MOUs).

SECTION IV.   PROJECT/PROGRAM IMPLEMENTATION

1. Determine how the agencies will blend/braid services for statewide CE services:
    a. Research options that will work in state.
    b. Decide about inclusions of Pre – ETS.
    c. Facilitation offered to create a "process map" of CE statewide services across multiple agencies.
2. Conduct CE Training based on plan.
3. Finalize CE policy including: definition of CE, certification, and rates (guided by Essential Elements of CE).
4. Finalize the certification requirements of providers.
5. Develop MOUs/Interagency agreements to reflect agency roles, fee structures, braiding resources.
6. Begin project: Identify referrals and goals for service delivery.
7. Implement evaluation and monitor progress with regularly scheduled conference calls with TA Centers.

SECTION V: POST IMPLEMENTATION EVALUATION, EXPANSION AND SUSTAINABILITY

1. Collect output data (training events and participation levels).
2. Complete formative and summative evaluations and provide written evaluation reports.
3. Conduct a meeting to review evaluation findings from the pilot and consider what worked and what did not work and discuss improvements or alternative strategies for implementation.
4. Develop or revise statewide policies, procedures, and fee structures for implementation.
5. Develop interagency agreements specifying roles, responsibilities, and funding levels.
6. Finalize a sustainability plan which ensures processes to support adequate levels of ongoing provider and staff capacity.
7. Evaluate the CE certification system (measure staff retention and client outcomes).