Introduction

1. What is a Community Action Team?¹
   A Minnesota Community Action Team (CAT) is an integrated learning community representing community organizations, schools, workforce development agencies, employers, family, and friends who work one-on-one with an employment seeker to discover his or her ideal conditions of employment. The group forms through a common interest in applying customized employment planning.

2. What is customized employment?
   Multiple CAT members and an employment seeker work closely to:
   - Discover the employment seeker’s skills and interests to create a vocational profile;
   - Define the ideal employment conditions for success; and
   - Discuss with an employer a potential job that fulfills the ideal conditions; or
   - Develop a small business that addresses their ideal conditions.

   Customized employment emphasizes working with one person and one employer at a time to create suitable options. The process does not look for readily available or easily-filled jobs or find employment at a single location for a group of individuals with disabilities.

3. How do participants benefit?
   - Employment seekers with complex lives and significant barriers to competitive employment receive intensive, tailored employment planning to identify and create employment that fits their ideal employment conditions.
   - CAT members learn proven techniques and leverage resources to achieve better employment outcomes for employment seekers.
   - Employers gain an employee who contributes to productivity and profitability.

4. Who should read this material?
   Professionals, family members and friends interested in an alternative vocational approach for chronically unemployed or underemployed people. Professionals may work in:
   - Secondary and higher education;
   - Vocational Rehabilitation Services;
   - Community rehabilitation programs;
   - County social services and state and federal agencies;
   - WorkForce Centers;

Local businesses; and
Community organizations and advocacy groups serving transition-age students and adult employment seekers.

The Minnesota CATs are a pilot project and a work-in-progress. Their approaches have evolved from initial efforts, technical and training staff’s assistance, and learnings from other states’ demonstration sites. This manual describes the basic ideas and steps, but experimentation and modification occur consistent with customized employment values.

5. Promoting change

Customized employment begins with the belief that all people are employable and channels resources to finding the ideal employment situation, not assessing employability. A supportive network of individuals helps an employment seeker discover his or her skills and interests to create a vocational profile. This profile helps identify potential employers and positions to take advantage of the unique skills and talents of the employment seeker, or to develop a suitable business ownership position.

In contrast, traditional vocational assessments apply standards to whether a person can find and hold a job, and often labels people as unemployable. Assistance focuses on job searches, interviews and filling low paying, entry-level openings. Customized employment is about discovering a position that is well-suited to the employment seeker and benefits the employer, too.

6. History

In June 2007, the Minnesota Employment-First Summit presented its vision “of making employment the first priority and preferred outcome of people with disabilities.” To increase integrated employment at minimum or competitive wages, the summit concluded that:

[The] real challenge is not in rehabilitating people. Rather, the real need is to rehabilitate the vision and goals driving Minnesota’s educational and rehabilitation service systems for youth and adults with disabilities. In other words, Minnesota needs to rebuild its infrastructure of support to promote the fundamental idea that all people with disabilities should exercise their choice to work, regardless of the severity of their disabilities.²

In February 2009, Pathways to Employment (PTE) initiated a two-year pilot program to implement two summit recommendations:

Create local “Communities of Practice” demonstrations to increase post-secondary education, training, and/or competitive employment outcomes, especially for individuals with significant disabilities who have experienced high unemployment or limited opportunities beyond center-based programs; and

Develop training and technical assistance resources to promote the vision through “critical training and technical support services for the leadership, management, and direct service staff of Minnesota’s secondary education, and to the disability, business, and employment provider communities.”

After a competitive Request for Proposals process, PTE contracted with Griffin-Hammis Associates, LLC, (www.griffinhammis.com) to form Community Action Teams (CAT) to conduct customized employment planning and support the teams and others through MNTAT, the Minnesota Employment Training and Technical Assistance Support Center (www.mntat.org). Minnesota’s CATs are similar to other customized employment demonstration projects operated by Griffin-Hammis Associates. PTE also contracted with Griffin-Hammis Associates to develop, organize, implement and manage the MNTAT, and provide training and technical assistance services targeted toward individuals with disabilities, their families, community organizations, employers, and county and state agencies.

Getting Started

1. Form a team

Team members are often the same people currently working with the employment seeker and may represent his or her lead case manager and service agencies that have a formal or paid role. However, the team concept should not discourage less-formal partners like a family member, friend, church group, vocational counselor or case manager from initiating customized employment planning.

A team may form from a pre-existing group, such as a Community Transition Interagency Committee, or by individuals who work together across agencies to serve people with disabilities. While many organizations could participate, the key quality is individuals committed to:

- Working one-on-one with each employment seeker;
- Applying their organization’s resources and community connections;
- Learning customized employment’s core concepts and techniques; and
- Innovating and experimenting within the core steps once proficient.

Although time commitment varies by consumer, team members should be prepared to dedicate a limited number of hours to these tasks every month.

Anyone with or without disabilities can benefit from customized employment practices. However, a team may focus on a specific disability or age group depending on members’ interest and local priorities. For example, one Minnesota CAT serves young people transitioning to adulthood.

In terms of process, successful teams:

- Focus small and start with five or fewer employment seekers;
- Build on their practices and experiences; and
- Connect with employers.

**TIP:** Plan the first-year goals and training calendar as soon as possible to keep momentum going and members committed.

## 2. Roles

Members fill one of three roles. One person manages logistics for training, technical assistance, communication/correspondence and fiscal matters. This individual is not the team leader; the team is a non-hierarchical support system with all members serving equally. However, some members must follow their organization’s operating rules and funding requirements, which may predetermine certain directions.

Each employment seeker is paired with team members trained in-depth on the discovery process (described below). Another set of members learn about the discovery process, give advice and direction, and provide critical community and social network connections. They participate less frequently in team activities and perhaps only in discussions about a particular employment seeker.

**TIP:** Educate and prepare potential members on the possible challenges of balancing their regular job commitments with the new team roles and learning significantly different approaches from their organizations’ current practices.

## 3. Training and support

Multiple classroom trainings and field experiences give CAT members the working skills and knowledge to apply customized employment planning. MNTAT staff visit each Minnesota CAT four to five times a year to give one day of classroom training and two days of field-based technical assistance, supplemented with webinars and videoconferencing sessions. The field experiences are critical for developing team members’ proficiency in working directly with employment seekers and their families, creating strategies to blend funds, developing additional resources and contacting local employers.

Griffin-Hammis Associates’ *Customized Employment Personnel Certification Curriculum Guide* covers:

- Customized employment and the discovery process.
- Touring local employers to perform job analysis for creating natural work supports.

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Identifying the employment seeker’s ideal employment conditions.
Social Security work incentives.
Developing and testing business ideas and creating business plans.

Initial immersion sessions help the teams apply the lessons sooner, but require extensive, upfront time devoted to training and field application. Alternatively, scheduling the training throughout the year helps team members absorb each session’s information, but may slow skill application until the training is completed.

At monthly team meetings and conference calls, members discuss each employment seeker’s progress, problem solve on barriers, and identify possible solutions for moving towards his or her employment goal. Technical assistance and training staff lend their expertise and help members learn from each other’s experiences. Joint CAT meetings and training promote further learning and sharing.

Social Security work incentive programs, employment networks, vocational rehabilitation funds, school individualized education plans and developmental disability and mental health day programs can fund customized employment planning. The Minnesota pilot project allocated MNTAT $5,000 per team as flexible funding to purchase tools, equipment, training, or emergency supports for employment seekers.

4. Timeline
A timeline is hard to specify, but forming and training the team to proficiency may last a year or more. Teams can begin training and working with employment seekers within the first two months. However, the time to recruit employment seekers and establish relationships with employers can require several months.

Working with Employment Seekers

1. Recruiting
The team starts with five or fewer employment seekers. Selection criteria can identify potential candidates, but should not screen out individuals; customized employment helps people who have not benefitted from traditional employment planning and some successful employment seekers may not appear as likely candidates at first. The best recruiting approach is talking with people about customized employment and gauging their interest for further participation. Technical assistance staff can accompany the team on its first recruiting visits.

TIP: Host an information session for potential employment seekers, families, case managers and counselors to introduce customized employment and its benefits. Present evidence that the approach has succeeded with Minnesota CATs and in other states.
Candidates should agree to participate in the discovery process, understand the nature of work, and willingly meet potential employers. Family members should also be enthusiastic supporters. Also, if he or she has one, a job seeker’s vocational rehabilitation or school counselor or county case manager must agree to support the customized employment plan.

No formal agreement is necessary to work with the CAT and the employment seeker can discontinue at any time. Employment seekers can continue with the CAT even if they become employed on their own; customized employment’s benefits extend beyond a current position. The employment seeker signs a consent-to-release form so core team members and technical assistance and training staff can access protected personal information.

2. The discovery process

One or more team members work with one employment seeker to learn about his or her life experiences, strengths, interests, communication and environmental preferences, motivations and challenges. The team members gather this information through conversation, observation and activities with the employment seeker, and also interview family, friends, teachers, case workers and other acquaintances. Specific practices include:

- Visiting the home initially to meet with the employment seeker and family;
- Observing tasks and activities in different settings to reveal talents and skills;
- Exploring the employment seeker’s neighborhood and other regularly visited places;
- Interviewing one to three friends, teachers or acquaintances; and
- Benefits planning.

Discovery is the most time-intensive component, and requires home and neighborhood visits and meetings with family and friends. Discovery cannot be rushed and must collect sufficient information so the team knows the employment seeker well. Throughout the process, the team members write down the following characteristics of the employment seeker:

- Observations of home, neighborhood and other familiar environments;
- Tasks and chores performed;
- Hobbies, interests and activities;
- Acquaintances’ impressions;
- Required supports; and
- Emerging skill/interest patterns and vocational themes.

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5 While candidates are encouraged to actively participate, some passively engaged employment seekers have obtained very suitable positions.

6 However, a school transition plan or vocational rehabilitation case file may require a formal agreement to pursue customized employment.

7 Griffin-Hammis Associates’ brand of discovery is called Discovering Personal Genius.

8 The Disability Benefits 101 Web-based tool (www.mn.db101.org) helps people explore whether work is possible, start setting goals and make informed choices about whether to return to work. If a person is ready to seek employment, the Minnesota Work Incentives Connection can perform a formal benefits analysis and give in-depth assistance (www.mnworkincentives.com).
Key process concepts:
- Discovery seeks to identify potential vocational skills and employment directions (e.g., woodworking), not to create a specific job description (e.g., woodworker).
- Interviewing and data collecting are accomplished through conversations, not questioning.
- Hobbies, activities and interests reveal the person’s skills and preferences but are not immediately considered the only vocational possibilities.
- The employment seeker is the primary source of information and controls the process.
- Observation occurs in both familiar and unique environments to gauge interest, generalize application of skills, and identify support options across various settings.

Challenges facing the team member:
- The discovery process may require two to eight weeks and 20 to 60 hours of engagement from core team members. However, the potential long-term results for the employment seeker’s life make the initial time-investment worthwhile and the time commitment is comparable to traditional testing and evaluation approaches (e.g. psychometrics).
- A tendency to think too soon about specific jobs and businesses, focus on a dream job, or worry about how unusual interests, such as swords, could be useful for employment. Discovery is observation and action to learn about the person and not about finding an employment solution quickly.

3. Inventory or build social capital
The discovery process includes taking inventory of, or building, social capital, which is a person’s reciprocal personal and professional relationships. These relationships identify possible employers for informational interviews. If the employment seeker or family does not know many people, the more-advisory CAT members draw on their own or their organization's social capital, such as a board of directors. Or further along in the discovery process, the team members help the employment seeker and family see their connections with businesses they regularly patronize.

4. Create and explore vocational themes
Through discovery, the team members identify at least three vocational themes to reflect the employment seeker’s interests, talents and skills with his or her participation to the extent possible. The themes are not job descriptions, business ideas, or occupations but rather one or two-word descriptors of the employment seeker’s interests and inclinations, such as transportation, animals or entertainment. The team members and employment seeker list three specific employers who fit each theme (nine total) and schedule two or more informational interviews, where the employment seeker and team members:
- Ask the employer’s advice on achieving the employment seeker’s career goals in this field to show interest beyond simply looking for a job.
- Tour the employer’s location after hearing the business person’s advice on career development in this field.
• Ask questions about hiring, training and getting started in the field.
• Perhaps ask for another visit to try common tasks or observe others doing them.
• Perhaps inquire about a half-day work experience if there appears to be a fit.

The team members summarize the visits in writing and indicate the strongest themes or if new interests appeared. Additional interviews or work experiences may occur, providing more insight into the employment seeker’s vocational themes. The team members complete the profile by writing a descriptive narrative on the employment seeker’s skills, qualities, learning modes, best environmental fit and vocational themes.

An example is:

Patrick is a recent graduate from a neighborhood school. He resides in Coon Rapids with his parents. Patrick is very familiar with his neighborhood. Patrick collects models of dinosaurs; for instance, he owns 23 of them which he began collecting at the age of 12; he can name each with their common scientific name and tell you about their diet, common enemies, and where on the planet they lived. Other interests include movies (particularly Ice Age and other Pixar movies) and non-fiction reading material. He’s interested in evolution, astronomy and other sciences and has several books on these subjects. Music and entertainment choices are Weird Al Yankovich and Cirque du Soleil. His favorite video game is the Dinosaur King. Patrick used Adobe to scan recipe cards from his school and has experience in high school graphic arts and ceramics. He assisted his family in building a garden wall this summer and is very familiar with the Science Museum.

Some of Patrick’s ideal conditions of employment include: ability to touch items and things in the work place; non-smoking, non-swearing environment; some loud noises can be bothersome/ though he can be loud as well; consistent; knowledge-based.

Themes: Science; Orienteering/Orientation; Investigation/Curiosity.

5. Develop an employment or business plan

At this stage, formal job development begins. The team members and employment seeker lists twenty employers who fit each vocational theme (60 total) and begin contacting four to five employers to schedule information interviews and discuss a customized position. Team members’ community and social networks provide a personal connection to potential employers who fit the vocational themes. The team members and employment seeker also create representational portfolios, picture books, resumes, and other tools for job development as needed. The team continues through each list of twenty until a job is secured.

TIP: Employers who fit the vocational themes likely have suppliers and other business connections that the team should consider, too.

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TIP: Focus especially on small businesses as potential employers because they have greater flexibility to adapt tasks to an individual’s skills and strengths.

TIP: Try to avoid traditional retail companies because many retail positions offer little career advancement or skills development. An artisan business with a retail component, such as a bakery, may be a terrific option.

When the employment seeker’s profile indicates that self-employment matches the ideal conditions of employment, business-planning starts. Self-employment requires in-depth planning, and the CAT members will likely require assistance. The most critical element is ensuring that the discovery process strongly suggested self-employment.

**Employer Engagement**

Customized employment requires in-person contact with specific employers to learn more about them and their businesses. Informational interviews and site tours help the team members and employment seeker determine the potential for a customized job to fulfill the ideal employment conditions. The employment seeker and team members develop ideas that demonstrate how the employment seeker meets the employer’s needs and adds value.

As with any employment opportunity, the agreement to hire is voluntary for both the employment seeker and the employer, and results in a mutually beneficial outcome. While people with disabilities are often hired because of an employer’s commitment to community service, customized employment is an economic development strategy that generates additional revenues from the employee’s contributions to the company.

1. **Approach employers**

   Employers are approached as people running a business, not as an entity. The goal is not to ask for a job, but to learn about the business and how the employment seeker can contribute through a newly created position or modified existing job. The team members and employment seeker request informational interviews to learn about the employer and generate interest in the individual.

   TIP: Schedule the first meeting for 15 to 20 minutes and research how the business works and its biggest staffing challenges so you ask informed questions.
2. Generate potential employment ideas

After the employer visit, the team members and employment seeker discuss whether an opportunity exists for the employment seeker’s skills to benefit the employer through:

- Faster or more accurate work;
- Better work flow;
- Assisting overburdened employees; and/or
- Enhanced customer service.

The employer must see a benefit to creating a customized job, especially if the employment seeker requires unusual or extensive accommodations or supports. A customized job should focus on the contribution to the employer and not create competition with other workers or applicants. A customized job can be created through:

- Selecting one or more tasks from an existing job description (job carving).
- Choosing all tasks currently performed (new, individualized job description).
- Creating new tasks to address unmet workplace needs or reassigning some of the incumbent workers’ tasks to the employment seeker (job creation).
- Dividing a job’s tasks and responsibilities between individuals based on each one’s strengths (job sharing).

The resulting position may become part of the supply chain or a business within the business, like an espresso stand inside a bakery. Informational interviews reveal these opportunities, and an employment offer may evolve naturally through regular conversations with the employer. Or, the job seeker and team submit a written proposal to discuss and revise with the employer. All participants should share a common understanding of:

- The position’s responsibilities (job description);
- The time, hours, work location and other conditions;
- Equipment modifications;
- Required support strategies and supervision; and
- Productivity and outcome expectations.

CATs are committed to customized employment at minimum or prevailing wages where integration and interaction with co-workers without disabilities and the community occur.

3. Once employment starts

Customized employment often requires individualized and flexible accommodations and supports to reflect the employment seeker’s and employer’s unique requirements. The employment seeker’s self-directed funds can pay for personal assistance, transportation coordination, adaptive equipment and other supports. The team members who worked with the employment seeker from the beginning provide
advice or consultation. The employment seeker may have a service provider or case manager who arranges the provision of supports.

A team member performs a job analysis to determine how the employer can best train and work with the employment seeker. This analysis identifies how the tasks are performed, tools used, natural supports, and speed and accuracy requirements. The team member advises the employer on the best techniques for training, presenting information, and supervising.

Once the employment seeker is working, the team members are no longer actively involved and will likely begin working with a new employment seeker. The CAT may receive periodic updates on the employment seeker and provide advice if necessary.

Resources

1. Youth and young adults with disabilities
   ◆ Online tools and information on employment, health coverage, and benefits to plan ahead and learn how work and benefits go together:
     http://mn.db101.org/
   ◆ The Disability Linkage Line provides telephone assistance and information about services, benefits, employment, health care, and more: 1-866-333-2466.
   ◆ Online job services and supports directory:
     http://www.mndisability.gov/public/content.do?term_id=139&level=1
   ◆ State Vocational Rehabilitation Services:
     http://www.positivelyminnesota.com/JobSeekers/People_with_Disabilities/index.aspx (general information)
     http://www.positivelyminnesota.com/JobSeekers/People_with_Disabilities/For_Youth_Young_Adults/index.aspx (Transition Services)
     **E-mail**: VRS.CustomerService@state.mn.us
     **Toll-free**: 1-800-328-9095
   ◆ State Services for the Blind — VR:
     http://www.positivelyminnesota.com/JobSeekers/Blind_or_Visually_Impaired/index.aspx
     **E-mail**: About.Info@state.mn.us
     **Toll-free**: 1-800-652-9000 (Voice and TTY)
   ◆ Camps to Careers:
     http://www.positivelyminnesota.com/All_Programs_Services/Pathways_to_Employment/For_Service_Providers_Community_Partners/Camps_to_Careers.aspx
   ◆ E-Mentoring:
     http://www.positivelyminnesota.com/All_Programs_Services/Pathways_to_Employment/For_Service_Providers_Community_Partners/E-Connect.aspx
   ◆ Zones for Youth:
     http://www.positivelyminnesota.com/All_Programs_Services/Pathways_to_Employment/For_Service_Providers_Community_Partners/The_Zones_for_Youth.aspx
2. **Employers who want to learn more about hiring people with disabilities**
   - **E-mail**: DEED.CustomerService@state.mn.us
   - **Telephone**: 651-259-7114

3. **Career Exploration for Youth with Disabilities**
   - Minnesota High School/High Tech (E-Connect)
     - [http://ici.umn.edu/mnhighschoolhightech/default.html](http://ici.umn.edu/mnhighschoolhightech/default.html)
     - Joe Timmons, timm0119@umn.edu, 612-624-5659
     - Sharon Mulé, ssrule@umn.edu, 612-626-0335
   - The University of Minnesota – Institute on Community Integration
     - [http://ici.umn.edu/](http://ici.umn.edu/)
     - **E-mail**: ici@umn.edu
     - **Telephone**: 612-624-6300
   - Guideposts for Success (Youth Transition):
     - [http://www.ncwd-youth.info/guideposts](http://www.ncwd-youth.info/guideposts)
   - The National Center on Secondary Education and Transition (NCSET)
     - [http://www.ncset.org/](http://www.ncset.org/)
     - **E-mail**: ncset@umn.edu
     - **Telephone**: 612-624-2097

4. **Customized employment**
   - The Minnesota Employment Training and Technical Assistance Support Center:
   - Griffin-Hammis Associates, LLC:
   - U.S. Department of Labor — Office of Disability Employment Policy

**Sample Documents**

1. MNTAT Community Action Teams checklist
2. Discovering Personal Genius: Team Process Chart
3. Sample Discovering Personal Genius Staging Record
Criteria for Year 1 MNTAT Community Action Teams (CAT)

**Description:** The CAT approach emphasizes that through collaborative efforts of a variety of interested stakeholders’ resources and strategies are better leveraged to support individual employment seekers achieve their employment goals. The initial goal of each Community Action Team is to support five (5) individuals with varying disabilities to become employed*.

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<tr>
<td>Other Partners (list)</td>
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<tr>
<td>Geographic Location (Rural, urban)</td>
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| How does this CAT show commitment to use individualized employment strategies? |  |
| Are the strategies this CAT proposes to use flexible? If so, explain. |  |
| How does this CAT propose to reach individuals of different disabilities? |  |

Source: The Minnesota Employment Training and Technical Assistance Support Center (MNTAT)

*For the purposes of this project, employment is defined as: “Regular or customized employment in the workforce on the payroll of a company (unless self-employed) at minimum or prevailing wages [and] where integration and interaction with co-workers without disabilities and customers is assured.” Source: The Minnesota Employment First Summit Consensus Report.
Discovering Personal Genius: Team Process Chart

Week One: Intake, Introduce, Interview Individual re: Discovery; Develop initial small Team of Stakeholders

Week Two: 1st Draft Discovery Timeline/Plan; Conduct Home Visit & Initial Discovery Activities

Week Three: Formalize Discovery Plan & Timeline; Arrange & Schedule activities; Expand Team Membership to include family, friends, experts including business people, fellow hobbyists, et al. as team members or "consultants;" Financial review; work incentives potential; benefits analysis, referrals to VR, et al.

Weeks 4 & 5: Identify thru action: Skills, Talents, Activities, Significant People & Places, Initial Informational Interviews & Work Experiences, Synthesize: Ecological fit, Begin developing the 3 Vocational/Themes, sketch out the Ideal Conditions...

Weeks 6 & 7: Wrap up Work Experiences & Informational Interviews; Complete DPG Staging Record; Write Employment Seeker Profile; Transition to Job Development (lists of 20, etc.)

Learning

Forming & Storming

Norming

Performing

Doing
**SAMPLE DISCOVERING PERSONAL GENIUS STAGING RECORD**

Instructions: This form is used to stage, structure, capture and record the major events of DPG. The recorder(s) should pay particular attention to how the tasks are typically performed, any accommodations, technology, supports, or specialized training strategies that should be employed.

<table>
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<th>Date initiated/Date Completed: 6/09/09 - 7/21/09</th>
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<td>Family Contacts: Father: Phillip, Sr.; Mother: Imelda; Brother: Frank; Sister: Melann</td>
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<tr>
<td>Phone/E-mail: 555-5565</td>
<td>Person(s) completing DPG Record: Jeff Moore, Rita Farley, Dee Wolfe, Kim Starp</td>
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<tr>
<td>Additional Contact Information: Sister lives in another province (AB)</td>
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<tr>
<td>Team Members: Phillip, Brother, Jeff Moore, Rita Farley, Dee Wolfe, Kim Starp</td>
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<tr>
<td>Consultants/ Experts to Contact: Christine at the Business Abilities Program in Kelowna if Phillip starts a biz</td>
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<tr>
<td>Comments/Considerations: brother has similar interest and some contacts for Phillip, but is very busy, travels for work.</td>
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**Stage One: Home & Neighborhood Observation**

Preliminary review of records, files, assessments to establish current issues, cautions, training, etc., that may be of relevance: Note that Phillip has medically controlled seizures but does wear a helmet; heat and work in direct sunlight are big contributors. Has not worked due to family safety fears. Brother is strongest advocate; parents are supportive but cautious. Has worked in Workshop since leaving high school at 19 years old. No work history, but has been doing assembly, recycling, janitorial, and shredding for the Worc Center in Kelowna.

**Initial Interviews:** Begin with the individual’s home and/or family home (if residing there). Called to arrange time when mom, dad, and brother could meet. Phillip is 33 years old and lives at home with parents.

**Date:** 6/9/09

**People interviewed & relationship to Individual:** Father, Mother, Brother. Dad is retired police officer and was a security guard in retirement until a few years ago at Montgomery Air Field. Mother was a school librarian now retired; Brother is a purchasing/manufacturing agent for a subsidiary of Lisle Corp. which makes machine tools. He travels extensively to “spec out supplier processes and tooling designs, quality control, and inventory management.”

**Recap of Information (attach field notes, pictures):** Phillip wants to go to work; brother is really pushing this; Phillip wants to move out on his own; Parents are supportive but a little cautious. Phillip says he’d like to wipe tables at MacDonald’s; he had a work trial there last year and got paid $10. The family thinks MacDonald’s would be a good place for Phillip to work but haven’t got other ideas. They do not want him near heavy equipment vehicles; Phillip wants to drive but seizures are an issue.

**Observations of home, bedroom, property, belongings that seem relevant:** Very neat home in nice neighborhood; bus stop one block away for city bus; evidence of parental hobbies: Mom: reading, water color landscapes; Dad: model airplanes, woodworking, large vegetable garden. Phillip’s room has a TV, CD player for music (rock and country); an old collection of WWII Canadian aircraft pictures on the wall, closet and drawers are neatly organized by him, dog bed in corner for his dog Turbo.

**Chores & tasks performed at home:** Phillip has set chores including: setting the table for dinner and always preparing the mashed potatoes; he clears the table and fills the dishwasher after meals;
accompanies mom or dad grocery shopping; takes trash out to curb weekly. Does not mow lawn or 
work in garden due to seizure fears of family. Feeds Turbo twice a day and takes him to the 
neighborhood pond and park for exercise and ball throwing, in the evenings when the sun is down 
after work.

**Hobbies, Sports, Collections, Interests noticed during home visit:** Likes going to Montgomery 
Field where his dad worked to watch planes take off and land; Annually goes with Dad and Brother 
to watch the Royal Canadian Flying Aces perform; loves his dog and understands basic training, 
grooming, play, leash methods; paints with mom some and has learned to paint her backgrounds for 
landscapes before she inserts the details; brother is restoring an old farm tractor and has been 
helping with that a few weekends, mostly scraping & washing grease and dirt off parts. Brother 
notes that Phillip constantly repeats: “get a car” and seems to want to drive.

**Family/friend/community activities individual engages in and regularity:** Attends church 
Sunday morning with parents. Although Phillip has a very low voice and limited verbal language he 
loves singing from the hymnal. Mom noted he doesn’t seem too excited by church otherwise. The 
family also has a big Sunday dinner each week and brother and friend of the family attend 
regularly.

**Neighborhood Mapping (resources, employers, transportation options, neighbors of interest, 
activities, civic engagement):** This is a residential neighborhood. We walked around the block 
with Phillip; he knows a few neighbors, but no one was outside at the time. There is a bus stop at 
the end of the street. Parents know quite a few folks since they have lived here for over 20 years. A 
small commercial district is about 2 blocks north; the small commercial airport is 3 blocks east and 
there is an attached air-park according to the Brother (he uses its services to ship/receive parts for 
the business). Their church is about 1 mile away. Grocery store is within a few blocks as well. Most 
people drive from the neighborhood to other community activities. The neighborhood park is just 
down the street. There is a school, mom’s former employer, just a 2 block walk away.

**Talents, interests and skills observable/revealed:** Phillip’s interests include music, dogs/pets, 
driving, airplanes/aviation, painting/art. Skills we saw or heard about included:

- Setting the table; running the dishwasher; walking and grooming the dog; cleaning tractor parts; 
painting backgrounds (sky, clouds, various neutral hues) with watercolors and oils using brushes 
and a pallet knife; selecting specific items from the shelves when grocery shopping; limited 
cooking…. He also is in charge of laundry for the house and does several loads per week using the 
washer and drier; then folds and puts the clothing away.

**Activities, situations, & locations that need to be avoided:** Hot direct sun or extended work in 
temps above 32 C should be avoided.

**Stage Two: Others to be interviewed** (person/relationship/role):

1. Worc Center floor supervisor
2. Sister
3. 
4. 
5. 
6.

**What was learned from each:**

1. **Worc Center floor supervisor:** 6/22/09 reported Phillip is a “hard worker” who really enjoys 
cleaning and recycling.
2. **Sister:** phone interview on 6/22/09 says she remembers Phillip being very interested in flying 
kites with her in the park and cooking although since she married and moved away 12 years ago
after marrying a rancher in Alberta they have not stayed in touch regularly. They see each other only once or twice a year for long weekends. She was surprised Phillip was still going to church since her recollection was that Phillip use to resist going. She mentioned that she would be happy to help anyway she could and was intrigued with the idea that Phillip might be able to own a business, saying she could give him some money if needed.

3.
4.
5.
6.

**Patterns Emerging: (Interests, Talents & Skills):** Interests include music or perhaps church? Working with brother on the tractor; getting to drive; his dog (not too sure about other animals); airplanes/flight/transportation; painting/art.

Skills as listed above, plus according to Worc Center he gets quite focused when working and tends not to take a break until the assigned task is finished. The jobs recycling and cleaning were not mentioned by Phillip, although cleaning at MacDonald’s was suggested by the family.

Phillip has various cooking and kitchen skills that may need to be explored/witnessed. His brother says he learns fast and his mother reinforced that, commenting that he is really great with the painting she gives him. His mother mentioned that Phillip is “very helpful.” He also does all the laundry for the household.

**Stage 3: Skills & Ecological Fit**

Five places where this individual can be observed in activities that give context to their Interests, Talents & Skills:
1. Taking a painting seminar at the Artist’s Cooperative
2. Observe working with his brother on the tractor
3. Arrange an informational interview at the aviation park
4. Arrange informational interview at a dog groomer
5. Drive go-carts at the local motorplex

**Observations for each location and the specific activities observed:**

1. 6/24/09-6/25/09: Took a water color class at the Artist’s Co-op. Wednesday and Thursday night; 2 2-hour sessions. Phillip was really tired the first night and barely stayed awake. The 2nd part of the class (night 2) he did really well. His abilities are more technical application of the paint, setting up and putting things away; he didn’t seem to have much artistic talent, but enjoyed the activities associated with doing art (not the art itself). He offered the 2nd night to clean everyone’s brushes for them.

2. 6/27/09: spent the morning with Phillip and his brother working on the tractor. The brother asked Phillip to assemble the tools by naming them and he was able to get them all but wasn’t able to recognize wrench sizes, so just brought them all over to the work area (brought a handful of sockets instead of just the ones requested). Took several small parts to the parts washer as requested, and scrubbed them clean, dried them with the compressed air gun, brought them back to his brother. He also helped his brother hold a part to steady it while his brother straightened the metal with a body hammer. Phillip was careful near the air compressor, was careful walking around tools and parts on the floor; asked his brother occasionally “is this ok?” as he was doing an assigned task.
3. 6/30/09. Informational interview with Judd Gregory, manager of flight maintenance at CarterAir Services at Kelowna Air-Park. Explained to Mr. Gregory that we are working on Phillip’s career plan, his interest in aviation and mechanical things (mentioned his work with his brother and the tractor and his father’s connections to the airport). Asked Mr. Gregory for advice on getting started. He told us he started in the royal Air Force, became a flight instructor and was now head of maintenance services. They are open 7 days a week serving commercial airlines, local tourist flight-seeing operators, medivac, oil company, mining company, logging company and charter-photography helicopters, etc. We toured the facility; Mr. Gregory told us they are the largest maintenance & service facility in the area and they serve 8 other companies all in the air-park who run various charter services, including running a kitchen to prepare light snacks for commercial, tourist and private jet charters (flight crews and customers), and a small laundry for shop towels, flight uniforms, and coveralls. We asked about emerging business technology and he told us things are always changing regarding avionics. We asked about hiring and training and he noted that they trained their own personnel and ran the flight school too, which served as a recruitment tool for them. We asked his advice on starting out in the aviation field and he suggested that someone without pilot or mechanical training would start as an assistant to the mechanics and aircraft maintenance people (ranging from painting, cleaning, sheet-metal work, electronics, food prep, laundry, etc.). We asked if he thought we could arrange perhaps a short work experience for Phillip doing an array of these tasks. Mr. Gregory hesitated and said he’d have to check with the owner first. We will follow-up in 2 days. (Since Phillip’s brother knows this company, he may be of some assistance).

4.7/3/09. Made arrangements to visit the owner of Petcetera, just a couple blocks from home. The owner, Sara Brown showed us around and explained their boarding, dog training, and grooming operations. Noted that they board cats and dogs, and also have a rehabilitation specialist to help with pets recovering from surgery. We asked specifically about grooming and she invited Phillip to help her wash and dry a yellow Lab who was a regular customer due to his infiruration with local skunks. Phillip said he really enjoyed learning how to use the overhead spray faucet and the blow drier. He did great with just a little instruction from Ms. Brown. She noted that even in the bad economy her business was growing, perhaps because people were working 2 or more jobs and not being home as much.

5. 7/6/09. Took Phillip to the go-cart track on Monday morning when no other customers were there. We used a two-steering wheel training cart and Phillip was not very good at steering, using the gas or brake. He started and stopped suddenly several times. After about 30 minutes his driving improved and we drove slowly and cautiously around the track. As our time was ending he asked if we could go fast around the track once with me driving (he wanted to go fast, but not be the one driving). We did, and he smiled from ear to ear. He said he wants to go back next week; I asked him if he wanted to maybe look into working there and he said no.

**Emerging themes:** Helpfulness/Helping Others do their jobs; transportation; pets; art.

**Supports needed during these activities (be specific):** Initial training needs to be paced and precise; (Phillip seems to know when to ask for help)

**What environments & activities need to be avoided and why?** Hot; sunny.

**What places, skills and activities need more exploration?** Aviation biz: noted that there may be a biz-within-a-biz opportunity doing laundry for the other businesses in the park; also running the
Sample Discovering Personal Genius
Staging Record (continued)

parts washer; learning about the food prep operations. Lots of options in this one business. They are open 7 days a week so weekends might be a good starting option. Will follow-up for a work trial. Need to explore pet businesses. Phillip showed great interest. Team will meet 7/7 to consolidate observations; next steps; and will brainstorm combining the themes into unique ideas (art and pets; transportation and helpfulness; art and transportation; helpfulness and art)

Where/when will this exploration occur? Week of July 15th: scheduled work trial (through brother) at CarterAir. In setting up with Mr. Gregory discovered they have kenneling services for transporting pets and for injured game animals/or wildlife relocations; and specific hands-on training in the laundry and running the parts washer for the mechanics. Follow-Up Notes:

Stage Four: Review
Former school/rehab staff to be interviewed: See previous notes
Other family members and friends who may reveal insights: Sister was consulted
Read files, assessments, medical/medication, behavioral and other records that may still be of relevance: Epilepsy and developmental disability predominates
Impact of this information on individual’s emerging profile: Instructional and support strategies need to be clear and intense at first; rapid skills acquisition appears typical if matches to proper mount of information given.

Stage Five: Vocational Themes (not job descriptions or business ideas)

Emerging themes that meld Interests, Talents, and Skills:

1. Transportation, especially aviation
2. Pets & pet care, especially dogs
3. Art, especially when helping others with their work

(note: a 4th emerging area is helpfulness, which appears to be the theme running through all the other themes; may be developing an Info Interview at Okanagan Restoration Service which provides emergency clean up services for victims of natural disasters, house fires, flooding, etc. This may merge Phillip’s skills and his helpfulness…)

Identify 3 places for each theme where people with similar themes work:

<table>
<thead>
<tr>
<th>Theme 1</th>
<th>Theme 2</th>
<th>Theme 3</th>
</tr>
</thead>
</table>
Select 2 places and arrange informational interviews.
CarterAir
Dog-ease Service Animal Training

Notes from interview:
1. 7/15/09 Met with Mr. Gregory and we began with a tour of the airplane service facility including the laundry. They use industrial machines, but the supervisor explained the operation step-by-step to Phillip and together they completed loading and starting a wash of coveralls. We moved to the kitchen and spent 45 minutes assembling 20 wine and cheese snack trays for 2 scenic flights scheduled for later in the day. Phillip watched and then assembled the trays perfectly after we modified the layout for him. Finally we entered the mechanics hangar and were instructed in the use of the parts washer. Phillip was asked to clean and dry a dozen wheel bearing retention washers; a set of rocker arms; and a brake caliper. He did have some trouble with the air gun for drying (the trigger was very stiff), but we worked together to complete the task; the mechanic noted that the gun was very difficult and should be replaced. There were no animals in boarding this day. We met up with Mr. Gregory before we left, 4 hours later, and thanked him for the opportunity to explore the tasks. Will follow up with a Thank-you note as well.

2. 7/16/09 The staff at Dog-ease were welcoming, thinking initially that Phillip was there to explore ownership of a service dog. The manager worked with us and Phillip learned how to measure and bag food for the night shift; he spent about 20 minutes walking a dog around the exercise yard on a leash; and he assisted the groomer with nail clipping by steadying the paws and sanitizing the instruments with cleaning formula and a cloth. Phillip did well on all tasks, but mentioned on his way out that the staff “looked at him funny.”

Which themes seem strongest? The aviation and helpfulness themes are very strong, especially when paired; the Dog-ease trial may have been less successful because the idea of helping others could be too far removed from the actual tasks? (note: this appears speculative!)

New interests/talents revealed? Very comfortable with strange dogs; listens intently to whoever is instructing him

Arrange further informational interviews and/or short (up to ½ a day) work experiences at the following places:
1. Collectors Auto Supply (which cleans and restores antique car and truck parts for sale through their website, Ebay, and Hemmings Motor News)
2. Western Wildlife Studios (which features wildlife and landscape paintings and sculpture from numerous artists sharing studio/gallery space)

What was observed:
1. These will be scheduled as part of job development if needed.
2. 
Stage Six: Descriptive Narrative
Consider the following in the description:
1. Interests, Talents, Skills as observed; best ecological fit; best learning mode/methodology; places/situations to avoid; personal resources (benefits, family support, savings, transportation); most Endearing/engaging qualities; exploitable skills; 3 strongest vocational themes:
Phillip is a 33-year-old man with strong family ties in this community and has interests in aviation, transportation, dogs, art, and helping others. He is skilled in the kitchen and laundry, has assisted in the restoration of an antique tractor, is a fast learner who pays strict attention to his instructor/ supervisor, and knows how to operate such equipment as industrial parts washers, air compressors, and kitchen equipment. He is skilled at preparing blank canvases for both watercolor and oil artists. Phillip enjoys assisting others in doing their jobs.

2. Ideal Conditions of Employment: Working in a cool or well-shared setting where Phillip can pursue his interests while working in partnership with his co-workers. Phillip learns best when shown a task and allowed to perform it at his speed; his speed rapidly increases with repetition. Work hours and days of week are not a concern at this time.

Stage Seven: Job/Business Development Plan
List of Twenty Places where people with similar Vocational Themes Work:

<table>
<thead>
<tr>
<th>Theme 1: Aviation/Transit</th>
<th>Theme 2: Animals</th>
<th>Theme 3: Art</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Kelowna Intn’t Airport</td>
<td>5. Dog Listener Training Service</td>
<td>5. Kiln Queens Studio</td>
</tr>
<tr>
<td>17. BC Farmers Cooperative</td>
<td>17. Interior Reef &amp; Marine</td>
<td>17. Architectural Blueprinting Company</td>
</tr>
</tbody>
</table>

Create representational portfolios, picture books, resumes, and other tools for Job
Development as needed;

Select 3 or 4 places and arrange Informational Interviews for moving into job development stage.
*Will occur after Team Meeting 7/20/09 to compare notes and begin Job Development*

1.
2.
3.
4.

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