SERIES OVERVIEW: This series shares research from ICI's ThinkWork projects, which focus on increasing employment for individuals with IDD. The goal of this series is to identify and share findings that support state agencies, providers, advocates, individuals and families to make the philosophy of Employment First a reality.

Introduction

Competitive integrated employment is defined within the Workforce Innovation and Opportunity Act (WIOA, 2014) as full-time or part-time work at minimum wage or higher, with wages and benefits similar to those without disabilities performing the same work, and fully integrated with coworkers without disabilities. The Act requires that states ensure employment is offered as a priority outcome for people with intellectual and developmental disabilities (IDD). As a result, providers who offer employment support to people with IDD have been working to phase out sheltered workshops and transform to offer competitive integrated employment.

The Institute for Community Inclusion (ICI) partnered with The Arc of the United States to identify ten elements of successful organizational transformation to competitive integrated employment. They asked four providers who successfully closed sheltered workshops to provide implementation strategies that they used according to each of the ten elements. The following brief will:

» define each element

» explain why it is valuable to the change process

» offer a set of considerations to providers.

Where the findings came from

The information in this brief came from two sources:

a) a Delphi process
b) case study research

Delphi Process

A Delphi panel consisting of experts in the organizational transformation process was convened to identify and rank the most important elements of organizational change. All panel members had knowledge and experience in either leading or participating in an organizational transformation process. Panelists identified and ranked ten elements necessary for organizational transformation (***www.thinkwork.org/essential-elements-organizational-transformation-findings***). These ten elements were used to design case studies with providers.

Case Study Research

Case studies were conducted with four providers that had undergone transformation toward integrated employment within the past 10 years. These providers no longer used sub-minimum wage, and the majority of individuals whom they supported had IDD. The finalists were:

» The Arc of Westchester
 www.arcwestchester.org/

» At Work!
 www.atworkwa.org/

» Work Inc.
 www.workinc.org/

» Penn-Mar Human Services
 www.penn-mar.org/

While the Delphi panel identified and ranked the ten elements necessary for successful organizational transformation, the case studies offered an opportunity to understand how each element was implemented in practice.

Element #1: Clear and Consistent Goals

What is it? To transform agencies' services, there is need for an explicit commitment to increasing competitive integrated employment. This commitment should be driven by a set of specific goals that are measurable, flexible to the needs of individuals, compelling, and easy to grasp. The goals must be directly reflective of your core mission, modifiable, and specific to an established time frame.

Considerations for providers:

» *Develop goals and time frames for the transformation.* You will need to create a vision for the transformation and engage in a strategic planning process to convert that vision into a set of goals, attaching specific timeframes to goals to act as benchmarks.

» *Set and track short-term goals to assess progress.* You can measure things like the achievement of job placement targets, time spent supporting individuals in the community versus the facility, and (later) employee retention.

» *Form a multi-stakeholder group.* For example, it could be a team that represents the full range of your staff and board members. Such efforts create multiple points of view and potential gaps to be identified and addressed as goals are developed.

» *Invest in external expertise.* Consider hiring a consultant to guide and support your strategic planning process. The consultant may work in collaboration with your multi-stakeholder strategic planning team, but they'll also bring their own skills and perspective.

Element #2: An Agency Culture that Supports Inclusion

What is it? Providers must establish an agency culture that values supporting individuals in the community rather than in facilities. The culture also values positive thinking, learning, creativity, innovation, and continuous quality improvement. Creating an agency culture that supports full inclusion ensures that daily practices and decisions are in line with the agency's core beliefs. By creating a culture that values new ideas, nurtures staff, is adaptable, and continually evolves, the entire agency will feel ownership over the transformation and beyond.

Considerations for providers:

» *Allow the agency culture to evolve.* The transformation process is evolutionary and will develop and progress over time, including shifting agency programs and policies to align with new priorities.

» *Center your agency's culture within the organization's new values, vision, and mission.* Agency cultures that are built on strong philosophical beliefs around inclusion and full community contribution are far more likely to make progress than those that are transforming only because of mandates. Set your vision and create your culture because you believe in it, and because you believe it is in the interest of those whom you support. Leadership can set the tone for the new agency culture by ensuring that policy and practice decisions match the agency's core values.

» *Create a culture that nurtures and invests in staff talent.* Effective agency leadership stimulates trust, teamwork, and high expectations to nurture staff talent. Whether it is through creating incentives for current employees or hiring new people, cultivating a mission-focused staff is an invaluable resource.

» *Emphasize continuous learning, innovation, and quality improvement.* Your agency culture needs to emphasize continual improvement, maintain a focus on the future, be flexible, and adapt to varied political and economic contexts.

Element #3: Active, Person-centered Job Placement

What is it? Providers must be proactive in finding jobs for one person at a time. This hands-on approach creates momentum and enthusiasm as successful employment outcomes are achieved and celebrated. An active, person-centered job placement process prioritizes the placement of individuals in the community and helps providers not to feel overwhelmed. Starting with a deliberate placement plan that includes identifying priority individuals can create a positive snowball effect.

Considerations for providers:

» *Create a prioritization system as you begin to move individuals out of the workshop.* You might start with the individuals who express the most

interest or enthusiasm, or those with the broadest skill set and work history, or those who are seen as leaders by others in the workshop and can be encouraging to those who are more cautious.

» ***Take the time to do a comprehensive person-centered discovery process.*** This process should include family members, friends, neighbors, and anyone else requested by the job seeker. Each participant will bring their own perspective and personal resources. Immediate family members learn about employment as well.

» ***Use exploration opportunities to broaden interests for employment.*** These might include workplace tours, where different job roles and responsibilities are identified, or volunteer positions that align with preferences. These opportunities will also give you another lens for understanding the individual's job accommodation and support needs.

» ***Use exploration opportunities to build human and social capital needed for work.*** "Human capital" includes job search skill building and soft skills. "Social capital" includes meeting and socializing with new people, as well as interpersonal skill building.

» ***Apply best practices in job development.*** Best practices include networking, person-centered Discovery and planning, volunteering, informational interviews, time-limited work trials, job creation, and job carving. This also means offering post-hire supports to ensure ongoing workplace accommodations.

Element #4: A Strong Internal and External Communications Plan

What is it? There is a need for providers to communicate clear, authentic expectations to a range of people. Internally, this includes all levels of staff, individuals with disabilities, and their families. Externally, successful organizations market themselves and their services throughout the community. Communication creates investment and engagement in the transformation process. It provides assurances, alleviates confusion, and tackles resistance to the transformation process head on.

Considerations for providers:

» ***Communicate about the intended transformation as early as possible.*** Even if you do not have all the answers, involve everyone early on in the transformation process and provide as much information as possible.

» ***Be as transparent as possible right from the beginning.*** Transparency and candor are critical to successful transformation. While confidence in your vision is important, don't hesitate to admit what you don't know or are unsure about.

» ***Use champions.*** A champion is someone influential who could assist in getting their peers on board. Champions can naturally emerge as participants share success stories about having new experiences in the community, finding a job, or shifting into a new role within the organization.

» ***Provide avenues for one-on-one or small groups communication with individuals and families.*** This will help build trusting relationships and provide support in processing the change.

» ***Use diverse modes of communication.*** This includes staff orientation, staff training, newsletters, email and regular mail correspondence, board reports, and social media.

» ***Positively frame your message.*** Campaign materials may include emails to individuals and their families, a revised brochure, refreshed text for your website, etc. Instead of "closing the workshop," for example, you might describe "a new business model with new opportunities for learning and contributing to the community."

Element #5: Reallocated and Restructured Resources

What is it? Transforming an agency means making changes to how it funds services, and how it directs staff to budget their time and energy. It is important to have an active and ongoing investment in realigning all fiscal, material, and staff resources to achieve the organization's overall goal: putting into place the supports and services needed for increasing competitive integrated employment.

Considerations for providers:

» ***Analyze your budget to ensure calculated risk and to set financial expectations.*** For example, you must critically examine cost per staff, revenue needed to break even, costs associated with the services provided, and any hidden costs.

» ***Realign current or emerging funds into staff resources.*** Take note of how and where your funding is not aligned with your new mission and decide where your resources can be restructured or realigned. For example, use capital tied up in your buildings toward new job developer positions, or invest in staff training.

» ***Transition away from contracts gradually if necessary to ensure sustainability.*** For example, you may be able to renegotiate contracts to create opportunities such as going to people's place of employment, instead of bringing the work to the workshop.

» ***Diversify your funding sources.*** Seek new ways to generate income to assist and/or fund the transitional phase. You might explore fundraising initiatives or apply for grants through private foundations.

Element #6: Ongoing Professional Development of Staff

What is it? An engaged and educated workforce is key to providing sustained, high-quality job development and coaching supports. Frequent training, continuing education, conference participation, and mentorship opportunities are critical to maintain core competencies and implement best practices. Successful organizations support employees at all levels to meaningfully contribute their ideas and energy to the mission. Professional development allows this to happen, as staff increase their skills and their investment in your agency's work.

Considerations for providers:

» ***Consider training an investment.*** Making training a priority before moving individuals out of the workshop helps to avoid front-line staff being left without the tools to be effective.

» ***Use professional development to facilitate engagement.*** Professional development increases staffers' confidence with their new responsibilities, making them feel more comfortable with their changing roles.

» ***Identify gaps in staff capacity, and tailor professional development activities accordingly.*** Think beyond just job placement and job development skill building and hone in on other needs, including addressing challenging behaviors, critical thinking, and problem-solving skills.

» ***Combine several different training methods.*** This may include online courses and webinars, in-person classes, informal trainings, and/or conferences, depending on your organization's needs. Complement training with mentorship, role modeling, and supervision.

» ***Seek out reputable capacity-building resources.*** Invest in trainers with experience in both the process of transformation and the latest best practices in job development.

Element #7: Customer Focus and Engagement

What is it? This means making strong, vital connections with two customer groups: job seekers with disabilities and their families, and employers. These connections are essential for success with community employment. Job seekers and their family members and guardians must be the first partners followed by the business community. Collaborating with both of these customer groups creates the value of mutual benefits of meeting individuals and market needs. It increases their comfort with your agency's transformation and builds trust, key to the success of the transition process.

Considerations for providers:

Engage individuals and families.

» ***Start with one person at a time (or in small groups) to build trust.*** This means offering opportunities for families to share their fears, setting up plans to reassure them, keeping them informed, and focusing on transparency, every step of the way.

» ***Combine formal and informal strategies.*** Formal strategies involve outreach through print or online

newsletters, and via social media and email. Equally important are informal gatherings, such as barbeques, picnics, and regular "office hours" at a local coffee shop.

» **Know your audience and create strategies that meet their needs.** For example, are some families more receptive about the transition to community employment? Are the families you serve from specific cultural and socio-economic groups?

Engage businesses.

» **Create forums for employer-to-employer storytelling.** Employers want to hear from other employers about successful experiences integrating people with disabilities into their workforce.

» **Join boards and associations.** This will expand your reach to the business community and local entities.

» **Talk about "the bottom line".** Sell employee skill sets that meet a business need. By identifying areas of employer inefficiency, you can show how hiring an individual with a disability will pay off.

Element #8: Performance Measurement, Quality Assurance, and Program Oversight

What is it? Providers must establish a clear framework for implementing and measuring administrative, management, and program strategies over defined periods of time. This helps to determine the impact of the provider's efforts, and to measure success in obtaining results. Data helps providers to learn about their provision of supports, and to make informed decisions about how they can increase efficiency. It also allows them to track their performance during the transformation process, and to celebrate their achievements through documentation of hard numbers.

Considerations for providers:

» **Starting the data collection process as soon as possible.** This will allow you to make the best strategic decisions during the transformation process.

» **Measure not only the quantity, but the quality of your employment supports.** This will mean

complementing the hard numbers with subjective information on job seekers' experiences.

» **Explore a range of formal data collection tools.** If they don't meet your needs, create your own.

» **Use and share your data.** Providers can use data to make informed decisions about service gaps or inefficiencies, to objectively evaluate their supports, to plan, fundraise, measure progress towards achieving their vision, set future goals, and to motivate your staff.

Element # 9: A Holistic Approach

What is it? Providers must consider the whole person with wrap-around life supports. At the individual level, a holistic approach enhances the career planning process with a broader set of resources and perspectives, as well as a deeper, more well-rounded understanding of the job seeker. At the organizational level, it creates opportunities for cross-departmental quality improvement and greater understanding of staff people's roles. Breaking down silos puts employment on everyone's mind and fosters efficiency and a shared sense of responsibility. This type of approach lets staffers make the most of each other's resources and specialties.

Considerations for providers:

» **Look at each person's whole life from the beginning of the transition process.** Providers must consider the whole person with wrap-around life supports as necessary.

» **Use non-work day supports for skill building and job finding.** Use day programs to engage in volunteer opportunities that build both hard and soft skills. Find recreational activities that build community access skills.

» **Make employment everybody's business.** Break down departmental silos, and make the goal of integrated employment every staff person's business. For example, residential staff can be involved in the discovery and exploration process, and if trained appropriately, can provide job-coaching supports.

Element #10: Multiple and Diverse Community Partnerships

What is it? This refers to engaging with organizations and state systems to create buy-in for the change process. These partnerships can happen with school districts, state agency offices such as vocational rehabilitation, faith-based organizations, and transportation resources. These partnerships can create new funding opportunities, expand opportunities for job seekers, and offer resources that build job seekers' human and social capital. Partnerships with other providers and those at the state level will allow sharing of ideas, and allow you to create a larger coalition invested in transformation.

Considerations for providers:

» *Identify your staff and board members' professional relationships.* This might include state agencies, elected officials, local school systems, colleges and universities, employers both large and small, and social service agencies. Use your staff and board members' relationships to continually expand your network of partners.

» *Describe your transformation effort to pre-existing partners and expect occasional resistance.* This means engaging partners in the idea of integrated employment, and even re-defining your relationship, for example with businesses that used to provide contract work in the workshop, and with schools that would refer students to the sheltered settings.

» *Use whatever resources each partner can bring to the transformation effort.* Take advantage of partnerships for exploration and Discovery opportunities, accessing support services that build job seekers' human and social capital, volunteering and internship options, and financing.

Conclusion

Organizational transformation will not happen overnight, but these ranked elements and associated strategies are offered as a roadmap to providers as a way to prioritize and begin planning. Achieving competitive integrated employment requires a paradigm shift to occur at all levels of the organization, from the vision, mission, and core values to clear, specific and timebound goals that guide allocation of resources. There is need for innovation and creativity in staff development, in internal and external communication, and in performance measurement. The organization must foster a culture of inclusion, value learning, and demonstrate continuous quality improvement.

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