



## Customized Employment Service Delivery Checklist

*Purpose:* To assess the integrity of customized employment (CE) implementation from the perspectives of CE providers' adherence to contractual obligations, performance expectations and the [\*Essential Elements of Customized Employment\*](#). Data from this assessment is intended for use by VR counselors in determining whether CE services are being delivered by vendors as authorized by the VR agency.

*Assumptions:* Individuals using this protocol have received some level of orientation or training on the CE process and are familiar with the provider organization's obligations and performance expectations as well as the fundamentals of CE as laid out in the Essential Elements. They have access to case records, case management system data, and vendor or practitioner contracts or agreements. Documentation for all items on the delivery checklist can be found in the case management record and CE documents for the employment seeker.

*Process:* Prior to checking the CE Delivery Checklist for a service provider,

- Become familiar with vendor (or practitioner) commitments
- Determine how many employment seekers' records will be reviewed to check for delivery (recommend > 30%)

*Instructions:*

- Complete the sections based on how much of the process has been completed. For example, if the Job Plan is currently being developed, then answer questions through the Discovery section.
- If no mention of an item is found, then the response is 'No'.
- In each section below if 'No' is checked, then provide comments that describe the reason for the rating unless instructions in the section say differently.
- If CE delivery items are not part of the contractual commitment with the service provider, enter NA in the 'Yes' column for Not Applicable.

Observations or concerns about the provider organization's ability to support and effectively deliver CE:

### Employment Seeker CE Delivery Checklist

The employment seeker:

Yes	No	
		Is classified as Significantly Disabled (SD) or Most Significantly Disabled (MSD)
		Requires more and different job services and supports than provided through traditional job placement services and for a longer duration
		Has little or no work history or has not experienced employment success
		Would benefit from the Discovery process and negotiated job duties with employer based on individual strengths and needs of employer
Comments:		

### Discovery

- For interviews (Int.), all interviews with same category are grouped on a single line
- For observation (Obs.), describe type (typical life activity or novel life activity) and setting
- If activity (Act.), briefly describe activity between employment seeker and service provider
- For records review (RR), note types of records sourced and if completed last

*Discovery Activities* include:

Category	Int.	Obs.	Act.	RR	Number	Length
Employment seeker	X					
Family	X					
Friends	X					
Other natural supporters	X					
Typical life activity		X				
Novel life activity		X				
			X			
				X		

Comments:

**Discovery Activity Effort**

Start Date		End Date	
Total # of Hours		Total # of Weeks	
Comments:			

*Discovery Document* includes:

Yes	No	Elements	Yes	No	Elements
		Strengths			Past employment information
		Needs			Education
		Interests			Life activities
		Family			Skills
		Friends			Conditions for success
		Living situation			Vocational themes
		Location in community			Potential contributions
		Transportation analysis			
Comments:					

The tone of the Discovery Document is based on the individual and their strengths (*add a Comment if 'Yes' was checked*):

Yes	No	
		Comparative comments
		Deficits discussed
Comments:		

The Discovery document was shared with employment seeker (date): \_\_\_\_\_

Yes	No	Element
		Employment seeker approved the sharing of the Discovery Document to relevant parties
Comments:		

### Job Search Plan

*Job Search planning meeting* was scheduled 2-4 weeks following Discovery (date): \_\_\_\_\_

The planning meeting documentation includes the following elements:

Yes	No	Elements
		No aspect of the planning meeting was decided on without the direct approval of the employment seeker (assistance may be provided)
		Planning meeting was facilitated by someone who participated in the Discovery process
		All planning meeting attendees are individuals who know the employment seeker
		If person without relationship with employment seeker was present, permission was given by employment seeker/family (enter NA under Yes if not applicable)
		With permission of employment seeker, copies of the Discovery Document were provided to meeting attendees
		The job development/employment specialist involved in the Discovery process was present
		At least as many individuals were invited to the planning meeting who are not paid to attend as those who were paid to attend
		Recap of employment seeker strengths, needs, and interests/vocational themes as identified in the Discovery process was provided in the meeting
		A list of job tasks or interests/vocational themes that fit the employment seeker was generated in the planning meeting
		A list of specific employers was generated consistent with the employment seeker's strengths, needs, and interests/vocational themes identified in the Discovery process  Number of employers: _____
Comments:		

*Job Search Plan* contains the following elements:

Yes	No	Elements
		The final plan reflects the wishes of the employment seeker rather than job openings or existing relationships held by employment specialists
		Plan includes the following in employer language:
		- Skills
		- Tasks
		- Interests
		- Vocational themes
		- Potential contributions
		- Conditions for success
		A prioritized list of specific employers consistent with employment seeker's interests
		Copy of final plan provided to employment seeker and funder
Comments:		

Employment seeker approved the plan for customizing employment (date): \_\_\_\_\_

### Job Development and Negotiation

Yes	No	Elements
		The primary customer during job development/negotiation was the employment seeker
		Employment specialist and employment seeker together determined the essential features of employment
		- Ideal features
		- Non-negotiables
		- Willingness to negotiate ideal features
		- Connect ideals to employment seeker strengths, needs, and interests
		Initial presentation introducing customized employment to potential employers was prepared and practiced
		Potential employers were approached for informational interviews or formal presentations on customized employment (preferred minimum is 4-5)  Number of employers: _____
		Potential employers were assisted in identifying specific, unmet business needs that relate to employment seeker's strengths, interests, and needs
		An informational approach was used with potential employers rather than persuasion
		Customized job description was developed with the employer with input from the employment seeker
		Permission was asked from employment seeker to disclose personal factors relevant to the job negotiation
		Support plan negotiated with employers as part of job negotiation
Comments:		

After the job negotiation was complete, the final job was compared to the job search plan.

Yes	No	Element
		Negotiated job placement reflects the job search plan
Comments:		