



## Q & A on Customized Employment: Successful Organizational Change

Over the past 20 years, there have been substantial changes in the delivery and funding of day and employment services for individuals with disabilities. Some organizations have successfully shifted emphasis from facility-based services to community employment. However, many individuals with significant disabilities remain in 14 (c) Special Wage Certificate Programs. The FY 2002-2003 National Survey of Community Rehabilitation Providers (CRPs) found that individuals with developmental disabilities continue to be predominantly supported in sheltered employment or non-work services (ICI, 2004).

Recently, the term customized employment has come to represent a flexible approach to individualizing the employment relationship between employees and employers to facilitate integrated employment outcomes. This fact sheet will summarize the experiences of six CRPs that successfully shifted focus from facility-based services to community employment outcomes in which individuals with disabilities earn at least minimum wage. The experiences of these organizations suggested seven characteristics that support organizational change and higher rates of participation in competitive employment.

### Q

**How were these characteristics for organizational change identified?**

### A

Interviews were conducted with key stakeholders at 6 organizations throughout the United States that successfully shifted focus from facility-based services to community employment. These CRPs were selected using a national nominations process as well as the results from a national survey of 643 Community Rehabilitation Providers conducted by Institute for Community Inclusion at University of Massachusetts Boston. Interviews were completed with agency staff, individuals with disabilities, family members, board members, and staff from funding agencies. In addition, individuals with disabilities supported by these CRPs were visited at their community work sites when appropriate.

### Q

**What are the agency characteristics that appear to support better employment outcomes?**

### A

The six CRPs shared a well-defined culture that emphasized clear and shared values, innovation, and a willingness to take risks. While each agency differed in their approaches, seven themes were identified that characterized the organization's ability to expand employment outcomes for its customers with disabilities. These organizational characteristics include: 1) an openness to risk taking, 2) shared values that direct service delivery, 3) an ongoing process for self-evaluation, 4) linkages to external resources, 5) a holistic focus on individual needs, 6) staff participation in the development of organizational goals and decision-making, and 7) an organizational emphasis on continuous improvement.

### Q

**Could you explain these characteristics further? For instance, how were the organizations open to risk taking?**

### A

These CRPs were willing to take action in situations with uncertain outcomes or when all of the details had not been worked out. Staff in these work cultures had substantial tolerance for change and uncertainty. One staff member from an agency noted that, *"you can't ever just get locked into one thing, because as soon as you do, we go a different direction. So I've learned to enjoy that, and become more flexible as time goes by."* The executive director of this same agency stated more directly, *"I think we didn't need everything to be in place prior to it happening...everything can't be just right for it to happen, or it will never happen."*



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### How did these organizations demonstrate shared values that directed their service delivery?



The organizations were characterized by a clear value structure that was shared across staff and other stakeholders. One staff person reported a clear commitment to the capability of any individual to succeed in integrated employment, which was a common value across all six organizations. Concurrent with these shared values were strategies for communicating and maintaining them, such as written policies within the organization. One CRP established agreements about how the agency would function that emphasized openness and personal responsibility. Along with the mission, these agreements are communicated aggressively with staff and others. One staff member summarized the effect as *"this company has a lot of faults and a lot of strengths, but you can't fault it for not being clear about its values. Somebody comes to work here and feels they want to cut a corner in terms of integrity, you just don't do that here."*

This combination of strong commitment across staff and established strategies for sharing values are repeated across these organizations. At one of the six CRPs, specific targets for consumer representation on the board and on the staff set a clear value for the individuals that the organization supports. Another organization set clear principles for its employment supports including statements that all jobs would be individual placements and that admission to the program would be zero-reject.



### How did an ongoing process for self-evaluation impact these organizations' ability to continually improve their services?



A willingness to be self-evaluative combined with staff who were comfortable with internal criticism of services supported the ability of these organizations to change rapidly and engage in continuous improvement of services. This trait at one organization was continually emphasized in staff interviews, as demonstrated by the following quote. *"There is a real willingness to say [we made a mistake], this isn't working as well as we thought it would, what can we do better?"*

A result of this culture has been a developing emphasis on continuous improvement. At one CRP, staff members have implemented a second stage of planning to address dissatisfaction with some of the outcomes, particularly a limited number of individual jobs. Another gradually reduced its group employment sites that originally had been one of its key strategies for moving individuals out of the sheltered workshop.

Staff members at two organizations also were encouraged to actively challenge the status quo of the organization. The vice president of one described how this push for innovation was communicated to staff. *"We tell our employees when they start with us, at the employee orientation, that if they do what we ask of them, they're good employees; if they can find a better way to do it, they're excellent employees. So everybody is constantly charged with, 'Look, this is the best that we can do; we know it's not nearly good enough; so your job is not just to do your job description, it's trying to figure out a better way to do this stuff."*



### How did these organizations link to external resources?



The change processes in these organizations were almost entirely driven by internal goals and values and not by outside sources such as funding. However, at the same time, they established strong linkages with experts who were knowledgeable in the national trends of employment services. Local linkages were characterized by strong community ties. For instance, one agency established a strong Business Advisory Committee that assisted with networking to companies. In addition, this same agency required committee members to meet individually with a program participant and employment specialist once a month to provide the participant with two business contacts per month. Another CRP emphasized reciprocity through staff participation in other community organizations. Their artisans' cooperative reaches out to the arts community through its gallery and through projects like an artist-in-residence program.

Organizations also reached out nationally by bringing in experts in integrated employment as consultants and sending staff to national conferences, as well as to visit exemplary programs. These contacts had a great deal to do with setting goals and directions. One organization emphasized the importance of its connection to the National office and its information and training. Another sponsored national experts to present to area programs. Two others became involved in statewide or regional change projects that provided organizational assessment and technical assistance support for shifting resources from facility-based to community-based services. This outreach helped provide a benchmark for the change process.

**Q**

## How did these organizations place a holistic focus on consumer needs?

**A**

Focusing holistically on the goals and needs of individuals served was a consistent theme for these six organizations, whether they used the individual or organizational approach to shifting to integrated employment. The approaches that organizations used to consider individual aspirations included person-centered planning, holistic intake and service delivery models, and identification of support needs using the natural environment. Families and representatives from the funding source for two of the organizations acknowledged these agencies for looking at the whole individual as the basis for their services, rather than just the employment needs.

A person-by-person mechanism emphasizes the importance of listening to individuals' hopes and dreams. Two of the six organizations used person-centered planning processes as both a change strategy as well as to identify the goals of individuals that they supported. Using this planning process, it became clear to staff and families in one CRP that individuals did not want to continue in adult day care on a long term basis. Another agency emphasized planning across nine life areas, even for individuals who only receive funding for employment services. One outcome has been an emphasis on helping individual's maintain prior social relationships. For example, staff assisted an individual who works in a hospital cafeteria arrange his schedule so he can have lunch weekly with his girlfriend whom he would otherwise be unable to see.

**Q**

## What were the staff members' roles in the development of organizational goals and in decision-making?

**A**

Staff members being empowered to take responsibility and play an active role in the management of their organizations resulted in consistently impressive employees at each organization. To emphasize the role staff plays in managing the organization, two agencies implemented self-managed teams as part of their process. At both organizations, the most complete incorporation of this concept has been in employment services.

Parents, funders, and board members described staff as creative, always having a positive attitude, willing to take chances to make something work for an individual, and driven by values. A representative of the funding source at one organization described the placement efforts of staff as follows: *If there is somewhat of an impediment, they can work through it and the consumer is not blamed. It's not a matter of 'well that person isn't ready' or 'if this person did something different we would be able to place them. It's always the environment isn't right, we will get there....[I] never hear negative [from the staff].*

Staff members at two of the CRPs were actively involved in the planning of organizational goals. Their input was obtained through staff retreats. At one, staff and consumers continue to participate in "think days" where they consider the direction of the organization. A manager at another described how staff put upward pressure on the managers to make change. *"You might not always get what you wanted, but you certainly could get your voice heard. Then I think having staff who felt comfortable enough to come to us as directors and say "wait a minute. You are sending us to all these great trainings, and we are coming back hearing what all the other agencies are doing, we are not doing this."*

**Q**

## How did these organizations place an emphasis on continuous improvement?

**A**

The focus on continuous improvement required staff to be flexible, since service approaches were changing frequently. In addition, they were required to be creative in developing new approaches when something was not working. This was reflected in some cases as a strong value for entrepreneurialism by staff.

Creating a culture that supported this entrepreneurial spirit was related to the organizations' emphasis on self-evaluation. One staff member reported that the organization tended toward hiring staff that were not satisfied with the status quo and were enthusiastic about finding better ways to do things. Another rewards staff for new ideas. By offering a financial bonus for innovative ideas, the message of continually looking for a better way to do business is clear to individuals at all levels of the organization. One vice president described the organization's culture: *"We continue always to look for better ways to do what we're doing ... So if you like change, this is the place to work; if you don't like change, this is not the place to work. So in our hiring of staff, we make that very clear up front, because we change a lot here."*

**Q**

## What can my organization do?

**A**

All organizations that implement a change process need to be clear and uncompromising about their goals and purpose. Each organization sets a clear goal and direction to increase integrated employment for the people they serve. They implemented policies and strategies that supported that goal. They used a variety of strategies to reinforce that goal, including staff training, use of external consultants, establishing a no-entry policy for facility-based programs, and reorganization into self-managed teams.

The importance of organizational communication was universally addressed across stakeholder groups and across organizations. Change is stressful for all stakeholders, and several organizations emphasized the need to attend more to both individual and group communication to keep stakeholders in touch with the organization's goals and directions. Organizations described a multi-strategy approach that included 1:1 communication during planning meetings, involvement of key stakeholders in strategic planning processes, newsletters, and public forums. Community Enterprises uses regular staff and consumer "think days" to bring representatives from different offices together to plan for the organization.



**Is the Executive Director the only person who can implement the change process?**



Contrary to the stereotyped image of change occurring through a dynamic leader, middle managers played a significant role in shaping the change process for some organizations. This finding is consistent with observations about the role of mid-level change agents in the business literature. There is a need to strengthen mid-level and line staff as change agents in organizations. Leadership skills can be nurtured by encouraging middle managers to be conversant in changes in the field through membership in professional organizations, attending local and national conferences, and sponsoring discussion through journal clubs. Middle manager roles in the organization can be strengthened through breakfasts and other informal forums with organizational leaders, and by providing an aggressive internal training program.



**What are some things that organizations should pay attention to as competitive employment outcomes are expanded?**



It is imperative that consumers be involved in developing goals for the organization and share in the values that form those goals. Keep an eye on the prize. Be clear about the outcome that the organization is seeking. In particular, be careful not to over focus on the process of change and organizational restructuring. While restructuring may be an important strategy, finding jobs for individuals is the primary goal. Remember the most critical outcome is consumer-driven employment with positive outcomes for the individual.

Develop and support change agents throughout the organization, since middle managers can play a critical role. Middle managers and direct service staff should participate in strategic planning, training, and other organizational development activities.

Focus on hiring staff that possess values consistent with the direction of the organization. People who understand the values of community employment can learn job development strategies, but a technically sound placement person who does not value individual choice and community inclusion is unlikely to learn those values. Support risk taking by staff to allow them to become more creative and empowered.

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