
Virtual Discovery Service Delivery Guidance

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CE in the Time of COVID-19

This document provides options for delivering core Discovery services virtually as a means for ensuring forward progress amid the travel restrictions, shelter-in-place or stay-at-home orders, and physical distancing requirements associated with the COVID-19 outbreak. Disruption to the typical flow of services as a result of COVID-19 requires flexibility and adaptability in the way Discovery information is gathered. In some cases, virtual connections through platforms such as FaceTime, Skype, or Zoom may temporarily replace physical face-to-face connections. In other instances, the extended timeframes where everyone involved is at home may allow employment specialists, employment-seekers, and team members to “dig deeper” and conduct more nuanced conversations around topics such as financial and benefits planning or when brainstorming the Lists-of-20.

This document provides guidance for each core stage of Discovery. The options detailed below are neither mandatory nor exhaustive. The need for flexibility is clear. When possible, efforts to gather information must continue in order to maintain momentum and to prime employment-seekers and employment specialists to move forward efficiently and effectively once restrictions lift and community life/access resumes. Because access to technology and the ability to make technology work will vary among staff and employment-seekers (and their supports), funders and providers must do everything they can to solve technology problems so that Discovery and Customized employment services can continue.

At the same time, Discovery must continue as an individualized service that aligns with the core goal of Customized Employment: creating employment options. Meaningful and authentic opportunities exist to continue learning about and building relationships with employment-seekers and their team members. Additionally, outreach to new and potential team and community members is possible. As with face-to-face Discovery, virtual services must follow Discovery methodology to be billable.

A final caveat: Although this shift in service delivery options is critical in the face of the impact of COVID-19, the options below are not meant to represent an alternative form of Discovery and Customized Employment. Instead, they are designed to highlight ways that teams can continue to move forward when physical community access is restricted. In no way are the following suggestions meant to become a formalized, permanent virtual alternative to existing Discovery services.

Conservative projections place the development of a coronavirus vaccine at 18 months. Until a vaccine is available, it is likely that community access will continue to be disrupted. It is our hope that Discovery and Customized Employment funders and providers proactively enact flexible Discovery service options and then move between standard face-to-face service delivery and these virtual alternatives as local conditions allow. Offering adaptive Discovery options will help counter the crisis’ disproportionate impact on individuals with disabilities, individuals who already face vastly unequal access to the workforce.

Stage 1: Home & Neighborhood Visit

Includes: Observations of home, bedroom, property, relevant belongings; chores & tasks performed at home; hobbies/sports/collections/interests noticed; family/friend/community activities. Neighborhood mapping. Talents, interests, skills observable/revealed.

Possible Virtual Stage 1 Activities

- **Accompany the job seeker on a home visit/virtual home tour using FaceTime or other technology.**
 - Just as you would during an in-person, face-to-face Home Visit, practice smooth listening to explore and learn more about the key areas highlighted in Stage 1: chores, tasks, hobbies, sports, collections, interests, family/friend/community activities
 - Join virtually as the employment-seeker (and family/team member as necessary) “walks through the home”, encouraging them to show, share, and tell more about the things that are most important to them as they go, or,
 - Ask the employment-seeker to record a home tour with narration, along the lines of the above bullet (you will need to find a way to have the video shared)
- **Conduct a virtual coffee break, pizza party, or other virtual face-to-face meeting with key people in the job seeker’s life** to introduce CE, establish rapport/build relationships, and learn more about the employment-seeker, his/her connections, and the people and things that matter most.
- **Ask the employment-seeker to share pictures or videos** of chores, familiar tasks, friends/important people, favorite trips or memories, and favorite/important activities or places in the community that s/he regularly attends or enjoys. Schedule a virtual meeting to walk through these pictures and videos together to learn more about each of them and why they matter to the employment-seeker.
- **Identify additional people to interview and opportunities for familiar Discovery activities** based on what was learned during the above activities.

Stage 1 Considerations

The list above is not exhaustive. You may identify other steps for getting to know employment-seekers and the people, activities, and places that are most important and meaningful in their lives. The ability to do each of the identified options will depend on the employment-seeker, his/her support system, and the available technology.

Benefits/Financial Planning

For most of the working population, employment and income are inextricably linked. People work not only for personal fulfillment, but also to earn sufficient money to support their financial goals. Trade-offs exist for many people, where they choose to work jobs that fall short of their dream jobs in order to earn sufficient money to pay the bills (or prosper) or, in some cases, to make do with less income in order to do their work of choice.

Although trade-offs such as these are common, they are often grossly disproportionate when it comes to the working income for people with disabilities. Over the last two decades, the national average number of hours worked per week has decreased from 29 to 9 for people with significant disabilities. Numerous factors influence this, of course, but two common issues include: 1) a lack of focus on financial planning and financial goal-setting as part of developing employment plans, and 2) concerns that work will negatively impact public benefits, including cash benefits and health insurance.

Disruption to the typical flow of services as a result of COVID-19 allows opportunities to have different conversations about “working with benefits.” Instead of asking employment-seekers which benefits they receive and referring them to a Work Incentives Planning & Assistance Project, employment specialists can spend more time talking through financial goals and exploring both the fears and opportunities associated with the specific benefits the job seeker receives. Sample activities are highlighted below.

Possible Benefits/Financial Planning Activities

- **Spend time talking to the employment-seeker and team members about financial goals**, either over the phone or (ideally) via a virtual conference call or FaceTime. Try to facilitate conversation beyond traditional benefits-related stopping points, such as “I can’t make more than \$1,000/month.” or “I [s/he] only wants or needs to work 5 hours/week.” Have a conversation about financial goals and what s/he would do with additional money, including where they would like to live, things they would like to do, places they would like to go, etc.
- **Assist job seekers as necessary to get their Benefits Planning Query (BPQY)** and confirm benefits received. Once received,
 - Identify possible work incentives they could apply for/use
 - Assess for PASS potential. If eligible,
 - Discuss the financial opportunities available through PASS
 - Draft/submit PASS applications
- **Refer job seekers to the Work Incentives Planning and Assistance (WIPA) projects** for a full benefits analysis.
- **Work with the job seeker and team members to run basic numbers** to see the impact that different amounts of earnings would have on their overall finances.

Referral for Technology Assessment

Conversations about the use of Assistive Technology should continue. Depending on circumstances, there may be more time to consider and research products, equipment, and systems that can enhance learning, working, and daily living for employment-seekers. Assistive Technologies can provide support for effective communication strategies, mobility needs, and specific environmental and task demands.

During the home visit, you had conversations about how things work for the employment-seeker. You learned how the person uses technology now. Smart-phones, computer software and hardware, screen readers, and voice-to-text are assistive technologies used universally. For individualized, specific needs, a consultation with a team of professionals is a good idea to find the right technology match.

Access to effective Assistive Technology can enhance the Discovery process and provide on-the-job accommodations and adaptations. Contact FAAST, Inc. (<https://faast.org/>) for information and assistance.

Stage 2: Interviewing Others

Includes gathering information from friends, families, connections identified during the home visit, and initial conversations with the employment-seeker and family/team members. People interviewed must know the employment-seeker well, want to see them succeed and have positive information to share. This step is often done virtually, so fewer shifts may be required.

Possible Virtual Stage 2 Activities

- **Conduct a phone interview**, practicing smooth listening, with others identified for interviews.
- **Schedule and conduct a virtual “coffee break” with interviewees.** Include the employment-seeker to have a more interactive conversation.
- **Connect with interviewees by FaceTime, Skype, or Zoom.** Invite them to share photos, videos, memories and share/walk through these online together.

Stage 3: Discovery Activities

Stage 3 involves accompanying the job seeker to: 1) complete at least two task-based activities that the employment-seeker currently does well and enjoys (familiar Discovery activities; and 2) complete at least four new task-based activities (unfamiliar Discovery activities).

Possible Virtual Stage 3 Activities

- **Identify and review any possible Discovery activities** with supervisor and/or mentor.

- **Conduct virtual familiar activities around the home** (Consideration will need to be given to phone/camera positioning):
 - **FaceTime:** Employment staff accompanies the employment-seeker on the activity via FaceTime (or other platform). If the employment-seeker has a garden, for example, the employment staff might join virtually as s/he tends to the herb garden, designs a flower bed, etc. If the job seeker regularly posts photos and communication on Facebook, or designs flyers and invitations for neighborhood events, the employment staff could create a screen sharing session to join the job seeker “in action.”

Other familiar activities that could be observed virtually: cooking a favorite meal; completing household chores; cleaning and maintenance of hunting and camping equipment; setting-up, tuning-up, and playing a musical instrument; demonstrating hobbies, including various arts, crafts, and sports; care and grooming of pets; lawncare; household repairs; etc.

 - **Video:** A family/team member records the employment-seeker as they complete the activity. The employment staff holds an online session via Zoom (or other platform) to watch the video with the employment-seeker and family/team members (as appropriate).

- **Conduct unfamiliar Discovery activities as possible**

Unfamiliar activities typically occur in new environments and involve completing tasks that are related to, and stem from, the interests and skills revealed through Stages 1 and 2 and the completion of the familiar Discovery activities. Although these activities typically occur in novel places in the community, alternatives during COVID-19 could include connecting with a community member to participate virtually in an activity to be performed at home.

An employment-seeker with mechanical interests/skills who has never changed a car battery, for example, might find a local mechanic—or shade tree mechanic who is also sheltering-at-home—who could connect with the employment-seeker virtually through FaceTime (or other virtual platform) to walk the employment-seeker through the steps of removing and replacing the car battery.

An employment-seeker with Art and Technology Vocational Themes may arrange a Zoom or Teams meeting with a Graphic Designer who is now working from home and, due to their new flexible work arrangement, has time to teach an introductory session on how to use Adobe InDesign.

Or, the stay-at-home order may offer the perfect time for Grandma (who lives on the other side of the country) to virtually teach the employment-seeker the family heirloom English Trifle recipe.

NOTE: It is anticipated that at least some unfamiliar activities will still need to be completed once the COVID-19 restrictions are lifted and people can once again access their communities. Not all employment-seekers will have the items required to perform these types of activities at

home, and the importance of supporting employment-seekers to connect with community members in person through these activities cannot be understated. However, numerous opportunities may exist to facilitate these connections and “try new things” even within the home environment, so employment specialists and team members should specifically and strategically consider these options.

- **Plan for and schedule additional activities to occur at a later date.** Make the initial connection with the community members or businesses where unfamiliar activities can occur.
- **Create a “Themes Map” with the job seeker.** This can be done virtually using Skype, FaceTime, etc. Both the job seeker and the employment specialist would have their own copy of the map and work on it together. Use the “Developing Vocational Themes Workbook” as your guide.

Stage 4: Vocational Themes (Emerging)

Stage 4 involves: identifying three emerging Vocational Themes; finding three small businesses where others with similar Vocational Themes work (3 themes x 3 businesses each = 9 businesses total); and completing informational interviews with at least four of these businesses.

One reason informational interviews are conducted during Discovery is because employment providers generally have little knowledge of the business community beyond those businesses represented by the “Big Sign Syndrome.” Even with these businesses, there is often a big difference between our idea of how they operate and the day-to-day reality of the work.

We conduct informational interviews because we cannot understand business and industry unless we create firsthand knowledge through direct, personal experience. Just as we can’t guess our way to a good job-match, we also cannot predict how businesses will adapt to current circumstances. Federal and State governments have offered specific guidance on business operations during the COVID-19 outbreak. Critical infrastructure industries and “essential” businesses are likely to continue operations, with altered operational rules. Where possible, businesses are running, but in different ways.

Some business adaptations we are seeing:

- Restaurants and Bars: Closed, except for take-out and delivery.
- Fitness Centers: buildings closed, but classes and instruction moved to apps and online.
- Retail: Non-essential retail businesses are closed. Essential retail businesses (Groceries, Hardware, Auto Supply, etc.) operate with restrictions.
- Manufacturing and Construction: expected to continue to operate with restrictions.
- Auto Repair: expected to continue to operate with restrictions.
- Advertising/Marketing: work from home.

When considering which businesses to approach and how they have been impacted by governmental orders, remember that small businesses comprise over 99% of all businesses in the US. About 80% of these small businesses do not have employees. In 2018, ninety percent of businesses with employees will have 20 employees or less.

These businesses are owned, managed, and run by people with lots of useful knowledge, skills, and experiences. Businesses such as a Gourmet Popcorn and Candy Shoppe, a Dirt-Model Race Car Chassis Manufacturer, a Professional Wrestling Dinner Theater, and a Pyrotechnic Art and Entertainment Company are run by smart, passionate people who have found customers by offering quality products and services. No matter what happens to each individual small business during the COVID-19 shutdown, the people interviewed will offer valuable information and insights for use by the employment-seeker and their team.

Although it is likely not possible to complete all Stage 4 activities virtually, there may still be many opportunities to connect with community business mentors and conduct these interviews even while the COVID-19 restrictions are in place. Leaders of “unessential” businesses may have time and availability while working from home, and others may have businesses with greatly reduced customers. Determination of virtual informational interviewing options will be dependent on the employment-seeker, their Vocational Themes, and current positioning of businesses related to these themes. In some cases, these restrictions may allow for rich opportunities to connect with community and business members and to begin to learn more about the businesses/fields, forge connections, and make plans to meet in person once the restrictions are lifted.

Possible Virtual Stage 4 Activities

- **Hold virtual team brainstorming meetings to discuss and identify emerging themes.** This could include developing a themes map using FaceTime, Skype, or other appropriate virtual platforms.
- **Work with team members to identify small businesses** related to these themes. Aim for small businesses that can be connected with virtually.
- **Identify social connectors for each small business on the list.** Take time to expand upon lists of existing social capital and to find at least one warm connection for each of the nine small businesses on the list.
- **Work with employment-seekers (and family/team members as appropriate) to plan for approaching and connecting with each of the target small businesses.** Identify skills or attributes to highlight and the plan for maximizing opportunities for the employment-seeker and business member to connect over commonalities
- **Conduct informational interviews via FaceTime, Skype, or online platforms to have a virtual “coffee meeting.”**
 - Learn about business and industry and seek advice. Allow business members to take the employment-seeker and employment specialists on “virtual tours” or “business walk throughs” if/when possible.

- Share relevant employment-seeker imagery and videos, as appropriate, to highlight skills and commonalities and to promote/facilitate connections.
- Seek advice and recommendations for other businesses to contact.
- Schedule follow-up in person meetings as appropriate.
- **Make initial contacts with small businesses where virtual informational interviews are not possible** and schedule plan for follow-up once COVID-19 restrictions are lifted.
- **Develop lists of additional small businesses to visit and get advice based on themes**

Stage 5: Vocational Profile

Stage 5 includes reviewing and synthesizing all information gathered during the previous Stages of Discovery in order to develop, share, and finalize the employment-seeker's Vocational Profile. Many of these activities can be completed virtually and facilitated through online team meetings using Zoom, Skype, or other virtual platforms.

Possible Virtual Stage 5 Activities:

- Summarizing information learned through Discovery
- Confirming the Employment-Seeker's three Vocational Themes
- Developing accompanying materials for job development (social media/imagery/video)
- Developing video portfolios or other high quality digital representational materials (that portray the job seeker in a valued and engaging manner, highlight capacity, tell his/her story in a meaningful way)

Job/Business Development Plan

The Job/Business Development Plan includes developing Lists of 20 businesses related to each of the job seeker's themes and the job development action plan. Many of these activities can be completed virtually and facilitated through online team meetings using Zoom, Skype, or other virtual platforms. In some cases, initial informational interviews may be conducted virtually, as described in Stage 4: Vocational Themes (emerging).

- Hold a virtual career planning meeting (to develop List of Twenty)
- Recruit community leaders with connections to be a part of the CE team
- Complete relationship charting with team members
- Develop portfolio/visual resume or other materials for job development

- Set up informational interviews
- Develop a plan for confidentiality
- Conduct informational interviews by phone
- Market research (SE)
- Implement virtual Business Feasibility studies
- Identify steps for securing resources (VR, IDA, PASS, Future Farmers of America, etc.)
- Develop the Lists of 20
- Survey employers for unmet needs
- Access social media for making connections/posting video portfolios
- Research and analyze possible transportation options
- Develop employment proposals including support plans
- Research supply chains that align with the vocational themes, looking for the artisan/maker economy

CRP/Agency/Organizational Level

Transformation to best-practice Discovery and CE service delivery does not happen solely at the level of front-line implementation. Community Rehabilitation Providers must also examine existing culture, policies, and practices and revise these as necessary to fully support Discovery and CE and ensure services are delivered with fidelity to best practice.

- **Support existing employment service recipients**
 - Identify strategies for supporting those already working or those laid off during pandemic
 - Review and implement recommendations detailed above to maximize support and forward movement of Discovery services while COVID-19 restrictions are in place
 - Ensure employment seekers and employment specialists have access to necessary technology while at home (collaborate with local VR or other entities to identify options for employment seekers to access needed technology, such as mobile phones, tablets, or computers and to support the associated costs of internet access or data plans)
- **Develop skills of front-line employment staff**
 - Send employment team members through comprehensive CE training (virtual options for secure ACRE with an emphasis in CE are now available)

- Secure additional topic specific virtual training as necessary (e.g., benefits planning, portfolio development, supervising CE programs, self-employment/CBTAC)
- **Assess and address internal policies/process to better support fidelity implementation of Discovery/CE services**
 - Review and revise organizational structures to support individual work of employment specialists, etc.
 - Take a broader view of planning – not just day-to-day, but weekly and monthly for employment personnel
- **Identify and implement opportunities for Board Members and other community connectors to positively impact CE service delivery**
 - Maximize agency economic capital by recruiting people with disabilities to become members
 - Recruit a board member to chair an agency-sponsored Active Employer Council
 - Encourage agencies to start exclusively recruit board members who have already hired people with disabilities
 - Use board members to open doors with employers
 - Conduct relationship charting with board members
 - Organize Active Employer Councils
- **Explore internal and external financial resources**
 - Develop an internal list of agency accounts payable customers to use for discovery activities, informational interviews, and developing jobs
 - Research and write grants that support needed economic development strategies
 - Collaborate with other agencies – VR, Workforce, etc. – on ways to promote CE and ensure uninterrupted service delivery while COVID-19 restrictions are in place
 - If you must reduce your workforce, start with non-revenue generating positions (management) and bolster your direct service workforce.