

# **AN IPS TRAINING GUIDE FOR SOCIAL SERVICE AGENCIES**

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## PREFACE

### Training Practitioners About IPS Supported Employment

This workbook will help IPS supervisors and trainers teach IPS specialists about IPS practice principles and the skills necessary to deliver effective IPS services. The workbook contains information about IPS, vignettes, and training exercises. A companion guide with more information about IPS is *IPS Supported Employment: A Practical Guide*, published by the IPS Employment Center. See [www.IPSworks.org](http://www.IPSworks.org).

This workbook includes the following topics:

- IPS practice principles
- Engagement of people in IPS services
- Active listening skills
- Collaboration with family members and other support people
- Job search strategies
- Job supports
- IPS services for youth, and
- Supported education

Also included in this workbook are forms and program tools. These documents are updated regularly. Readers will find the most up-to-date versions at [www.IPSworks.org](http://www.IPSworks.org).

### Terms Used in This Workbook

IPS stands for Individual Placement and Support. IPS is a specific type of supported employment program originally developed for adults who have serious mental illnesses. It is well defined by eight practice principles and a 25-item fidelity scale.

We use the term IPS specialist to denote the practitioners who help people with education, job training, job searches, and job supports. Some programs use other terms such as supported education and employment (SEE) specialist or employment specialist.

Throughout the workbook we refer to mental health treatment teams. Those teams may include counselors, medication prescribers, care managers, therapists, housing specialists, peer specialists, or others. The teams meet regularly to discuss and coordinate services they provide to people they serve together. The people receiving services are not present at these meetings. IPS is sometimes available to people who do not have a primary diagnosis of serious mental illness. When that is the case, other types of service providers form a support team, for example, when IPS is implemented in housing programs for homeless youth, housing specialists and care managers may take the place of the mental health treatment team.

## How Program Leaders and IPS Trainers Should Use This Workbook

This workbook, used along with *IPS Supported Employment: A Practical Guide*, introduces IPS specialists and mental health practitioners to the basic principles and skills they need to deliver effective IPS services. Since team-based services are essential in IPS, we recommend group training sessions. Discussing ideas within a group creates opportunities for practitioners to learn from each other.

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## Table of Contents

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Preface	ii
Introduction: How Agency Leaders and IPS Supervisors Should Use This Workbook	v

### **Modules**

1	The IPS Approach	1
2	Engagement, Benefits Counseling, and the Career Profile	12
3	Learning about Different Occupations	21
4	Supported Education	28
5	IPS for Young People	40
6	Job Finding	47
7	Job Supports	55

### **Appendices**

A	Sample Career Profile	63
B	Job Start Report	77
C	Job End Report	78
D	Education/Training Report	79

# INTRODUCTION: HOW AGENCY LEADERS AND IPS SUPERVISORS SHOULD USE THIS WORKBOOK

## i. Prepare Agency and Program-specific Information

In addition to the materials in this workbook, provide IPS specialists with agency-specific policies and procedures, including the following policies:

- Client rights: IPS specialists should be aware of state and federal client rights requirements.
- Client confidentiality, including agency policies related to texting and sharing information with employers and educators.
- Safety procedures, including those related to working in the community and visiting clients in their homes.
- Mandated reporting. IPS specialists must know how to report suspected abuse and neglect. They must also know what to do if they learn about illegal activity and threats of harm to self or others.
- Program intake and discharge criteria.
- IPS referral process.
- Program intake process.
- Requirements for service documentation: IPS specialists should know what documentation is required, for example, documentation of outreach attempts, completing the Career Profile and updates to the Career Profile, Disclosure Worksheets, Job Search Plans, Job Support Plans, Supported Education Plans, summaries of client services provided (typically referred to as progress notes), and Transition Plans for people who no longer require/want IPS services. They must also understand requirements for the timeliness of completing each type of documentation.
- Billing procedures.
- IPS program outcome monitoring process.
- IPS program goals for improvement.
- Agency process for applying the Supported Employment Fidelity Scale, revised 2008 (25-item IPS fidelity scale) and the IPS Fidelity Scaled for Young Adults (IPS-Y).
- Information about state Vocational Rehabilitation.
- Expectations for rates of employment and job starts per quarter for each IPS specialist.
- Laws pertaining to employment practices, including the Americans with Disabilities Act (ADA), local and federal laws pertaining to the rights of workers with conviction and arrest histories, the Federal Bonding Program, and the tax credits for employers.
- Basic information about work incentives for Social Security benefit recipients, as well as information about ABLE accounts related to the Achieving a Better Life Experience Act of 2014. IPS specialists should also know the steps to connect clients to trained work incentives counselors (benefit counselors).

## ii. Plan to Help IPS Specialists Develop Needed Skills

Classroom-style training provides information, but it is only the first step in helping practitioners develop new skills. Many practitioners benefit from side-by-side coaching as they do their work. An IPS specialist or trainer can assist new IPS specialists as they get to know new clients, meet with employers, join mental health treatment team meetings, and perform other duties. In the beginning, IPS supervisors work side-by-side with IPS specialists on a frequent basis. Over time, supervisors continue to provide this type of supervisor on a less frequent basis to ensure that specialists do not drift from using best practices. An example of helping IPS specialists learn how to develop relationships with employers is outlined below.

Supervisor's Plan to Help IPS Specialists Learn to Develop Relationships with Employers	
1	Didactic Training: Three hours. Discussions about how to build relationships with employers, role-playing with each other, and discussing how to respond to difficult situations.
2	The team, including the supervisor, will go to businesses in pairs to contact employers. If the team consists of just one IPS specialist, the supervisor and specialist will work together. After two hours, everyone will meet back at the agency to discuss their experiences.
3	Repeat #2 once a month for three months.
4	The IPS supervisor will go out to businesses with a different IPS specialist once a week for two months. The supervisor will continue to go out with IPS specialists monthly until they demonstrate proficiency.
5	The supervisor will go out with each IPS specialist quarterly to ensure that IPS specialists do not drift away from using good practices. As she observes IPS specialists using good strategies in different situations, she will share those with the rest of the team.

Another way that IPS supervisors and trainers help IPS specialists use IPS principles is to occasionally meet with specialists and their clients. When a specialist reports that a person is not making progress, a supervisor may ask to accompany the specialist the next time she meets with that person. By doing so, the supervisor may learn that the specialist needs help individualizing job searches or that she has not understood her client's preferences.

IPS supervisors sometimes worry about working side-by-side with IPS specialists. What if they cannot think of new ideas to try? But supervisors who do work with specialists gain credibility with the team, even when they are upfront about learning alongside of their staff. IPS specialists appreciate being supervised by a person who understands their jobs.

IPS specialists may worry initially about being observed by a supervisor because they feel they are being evaluated. We recommend that supervisors demonstrate a skill first and then assist the IPS specialist as he tries the new skill. While learning to build relationships with employers, a supervisor will introduce herself to the first employer and ask for an appointment. Then the IPS specialist can introduce himself to the next employer. When supervisors make mistakes, they should point out their errors. Doing so will help the specialist learn and will lessen the specialist's discomfort when he makes mistakes. As they work together, the supervisor and IPS specialist discuss their performance. What just went well? What should we try differently next time? Exchanging feedback helps both people improve.

### iii. Monitor Outcomes and Set Goals

Effective IPS programs are those that help most people find jobs that they enjoy. It is critical to monitor a simple set of outcomes that indicate how well the program is doing, and how each individual IPS specialist is performing his job. An example is below.

IPS Outcomes January through March						
	CASELOAD	NUMBER WORKING	PERCENT WORKING	GOAL	JOB STARTS	EDUCATION OR TRAINING
IPS TEAM	58	23	40%	45%	8	3
Elena	18	9	50%	50%	3	2
Mark	21	9	43%	47%	4	0
Chris	19	5	26%	36%	1	1

A benchmark for good performance (based on outcomes from the International IPS Learning Community) is a 41% quarterly employment rate. Programs in the upper quartile (excellent performance) maintain a 50% quarterly employment rate. Based on those benchmarks, the program in the example above is doing pretty well. The supervisor should share outcomes with the team and help them set a goal to improve their outcomes by 5% in the next quarter. Elena has excellent outcomes, and Mark is doing well. The supervisor may help Mark set a goal to gradually reach 50% employment and she would also offer to help him. When they meet to discuss his outcomes, Mark may reveal that he is having difficulty engaging some people on his caseload and in that case, the supervisor would offer to help him engage those people. Chris may be a new IPS specialist who has not had time to develop all of the skills he needs to do his job well. The IPS supervisor would make sure that he gets extra training and supervision. Because many specialists are nervous about meeting employers, she would offer to go with Chris to speak with employers.

Many IPS supervisors make outcomes transparent. In other words, they share a simple table like the one above at monthly or quarterly team meetings. Transparent outcomes make expectations clear so that specialists know exactly what is expected of them. That may feel intimidating to some team members in the beginning, but the supervisor will explain that she wants everyone to learn from each other.

### iv. Prepare to Facilitate Each Training Module

Before each training module in this workbook, there are Training Notes for IPS Supervisors and Trainers. Review the notes to determine who should be invited to the training. For example, the first module reviews basic information about IPS practice principles. Mental health practitioners should attend the session so they can explain IPS to people who are unemployed. But they may not need all of the training modules. Gather the materials listed in the training notes. Also, share the reading material for each module so that training participants can prepare to learn together.

The training facilitator may wish to read more about each topic area. One source of information is [www.IPSworks.org](http://www.IPSworks.org). Facilitators can also download the Supported Employment fidelity scale or order *IPS Supported Employment: A Practical Guide* at the same site.

## **v. Arrange for Technical Assistance from a Trained IPS Consultant**

Some agency leaders hire an experienced IPS trainer. Trainers provide didactic training as well as in-person technical assistance, such as going with IPS specialists to meet with employers, participating in IPS team meetings, and joining mental health treatment team meetings. And trainers help supervisors interpret program outcomes and develop plans for improvement.

IPS programs use the 25-item IPS fidelity scale or the IPS-Y fidelity scale for young adults to assess their program implementation. Fidelity refers to extent to which a program follows IPS standards, and a fidelity scale is a tool for measuring this.

Annual fidelity reviews are highly recommended. Typically, a team of two reviewers (who are often also IPS trainers) visit the agency for two days to learn all they can about how IPS services are provided. They provide a written report with suggestions and arrange a call with agency leaders to discuss agency strengths and areas for improvement. When it is not possible to contract with external reviewers, agency leaders sometimes make arrangements for someone on the staff to become trained in IPS and apply the scale as faithfully as possible. An example of this is of an agency that contracted with external reviewers for two years. During the reviews, the agency Quality Assurance (QA) Director and one of her staff members shadowed the reviewers. On the third year, the QA Director and staff member conducted the fidelity review.

# MODULE 1

## The IPS Approach Training Notes and Exercises

### 1.0 Training Notes for IPS Supervisors and Trainers

Who to invite:	IPS specialists IPS peer specialists (if available) Mental health practitioners Agency leadership State vocational rehabilitation counselors
Length:	Two and a half hours
Material to share with participants one week in advance:	The module (reading material)
Materials to be copied:	Exercise: Integrated services
Equipment/supplies needed:	Computer and projector to show Introduction video. Flip chart with practice principles written on first page. Marker.
Other preparation:	Ask three working people to speak at the training about their jobs (about 7 minutes each). Prepare questions to ask if people have trouble describing their return to work. "Why is your job important to you?" "Who gave you hope that you could work?" "What might help other people overcome some of the barriers that you experienced?" "Do you have plans to stay at this job or to do something else?"
Training Outline:	<ol style="list-style-type: none"><li>I. Welcome. Senior management explains how IPS fits the mission of the agency. 10 minutes.</li><li>II. Review practice principles (read the first principle and ask group to describe what it means, repeat for each principle.) 20 minutes.</li><li>III. Discussion question: What is an evidence-based practice? Ask the group and give them a few minutes to discuss/share ideas. (Possible answers: Evidence-based practices help practitioners apply scientific research to their work. It ensures that practitioners use practices that lead to good outcomes (in this case, high rates of employment). It does not prevent services from being individualized. IPS focuses on client preferences for jobs and services. Job and school supports are individualized, etc.) 5 minutes</li><li>IV. Working people share their experiences. Help them, if needed, by asking questions (see above). Ask the group if they have questions for the presenters/working people. 30-40 minutes.</li></ol>

	<p>V. Exercise: Integrated Services. Break up into groups of 3-5 people. Ask groups to read the exercise and give them 15 minutes to write action steps for better integration. Reconvene the large group and ask each small group to report. Write action steps on flip chart to review with steering committee later. 25 minutes.</p> <p>VI. Show “Introduction to Supported Employment” video found at <a href="http://www.IPSworks.org">www.IPSworks.org</a>. Ask group which principles were illustrated in the video. 20 minutes.</p> <p>VII. 1) Ask audience to turn to person next to them and give them seven minutes to discuss: What was your first job? How did you like that job and would you still want to do it? 2) Get the group back together and ask if a few people would be willing to share what was discussed. Talk about how the importance of the right job match and preferences, including for people who do not have much work experience, who have legal histories, etc. 15 minutes.</p> <p>VIII. Explain next steps for IPS implementation and conclude the training</p>
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## Module 1 Exercise: Integrated Services

In IPS, employment and mental health services are integrated. IPS specialists are assigned to one to two mental health teams and attend a weekly meeting for each team. During the meetings, IPS specialists and mental health practitioners engage in conversations about possible good job matches, how to engage clients in IPS services, successes, and good education and job supports. Some people reviewed during the meeting do not have an employment goal, but the IPS specialist stays for the entire meeting to learn about people who may be referred to IPS in the future, and to suggest IPS services for others. IPS specialists have office space near their mental health treatment team(s) so that they can connect easily between meetings. Client records include mental health treatment and employment documentation so that all team members are aware of how people are making progress on their goals.

I. What aspects of good integration are in place at our agency?

II. What steps would improve integration?

# MODULE 1

## The IPS Approach

### 1.1 Why IPS?

Although two-thirds of people who have serious mental illnesses say that they would like to have a job, only about 15% of people with serious mental illnesses in the public mental health system U.S. are employed. The goal of IPS is to help people with serious mental illnesses find and keep competitive (regular) jobs. IPS facilitates recovery by helping people get on with life beyond illness.

#### **Gabriel's Story: Life Beyond Illness**

Gabriel had his first manic episode during college where he was studying music and playing in a band. He spent much of the next several years drinking and smoking marijuana with friends. One day, Gabriel told his clinical case manager how terrible he felt about his life. He berated himself for being “a mental patient” and not working like his old high school and college friends. Gabriel's case manager followed up on this expression of interest in work by introducing him to the team's IPS specialist.

While out for coffee the next day, the IPS specialist asked Gabriel about his dream job. Gabriel said he had always dreamed of recording his own music. The IPS specialist wondered aloud what steps might be available now that could lead to such a career. He also mentioned that he had just that morning seen an advertisement for a part-time job in a record store.

Two years later, Gabriel is a manager at the record store and plays guitar on weekends with a few musicians he met at the store. He has stopped drinking completely and smokes less marijuana because he found that too much marijuana interferes with his job. Feeling better about himself, he has taken more initiative in managing his symptoms and has not been in the hospital since he took the job.

Gabriel stopped receiving IPS services about a year ago because he no longer needs supports to maintain his job. He recently told his case manager that he may be interested in pursuing a degree in music. When Gabriel feels ready, the case manager will contact the IPS program so an IPS specialist can help Gabriel develop a plan for career advancement.

### 1.2 Evidence for IPS

IPS is the most extensively studied model of employment services for people with mental illnesses and a strong evidence base supports its effectiveness. As of the writing of this toolkit, 26 randomized controlled studies (the gold standard in medical research) have been conducted to evaluate the effects of IPS. In each study, the IPS program produced better employment outcomes than the comparison program or programs. In these studies, people who participated in IPS services were more successful in obtaining competitive work (regular jobs), they worked more hours, and earned more wages from competitive jobs than people who engaged in other types of vocational programs, such as stepwise programs that typically include lengthy prevocational training and assessment, work adjustment training, sheltered or volunteer work experiences.

IPS supported employment program leaders use a 25-item fidelity scale (the Supported Employment Fidelity Scale, revised 2008) to guide their services. The fidelity scale is based on research; programs with good or exemplary fidelity scores have better employment outcomes than those with fair or poor fidelity.

Mental health practitioners, IPS specialists, clients, and family members are sometimes concerned that competitive work will be stressful and may increase the chances of relapse and hospitalization. Working is stressful, but it is much less stressful than long-term unemployment, which leads to many negative outcomes. Studies have consistently found that IPS clients do not have any increase on negative outcomes. IPS clients do not experience more severe symptoms, nor do they require more intensive psychiatric treatment. In fact, people who become steady workers are better able to manage their illnesses and have fewer hospitalizations. And some research studies demonstrate that when clients succeed in finding competitive work, improvements may occur in symptoms, self-esteem, and satisfaction with finances.

In summary, extensive research on IPS shows that it greatly improves competitive employment outcomes more than other types of vocational programs without causing negative effects.

## 1.3 What is IPS?

IPS is an approach to helping people with regular jobs in the community. When a person says that he is interested in work, his therapist, care manager or another person refers him to IPS right away regardless of issues he may be having with his mental health or other problems. Research has demonstrated that people are their own best judges of when they are ready to work. An IPS specialist meets with the person two or three times to learn about his interests, past work experiences, education, and goals. She also offers to connect him to a benefits planner so he can learn how his entitlements (if any) will be affected by wages. Then the IPS specialist and client begin looking for jobs right away that are related to the person's interests and long-term career goals. They may go together to speak to managers, or depending on his preferences, the job seeker may complete these activities on his own. After someone becomes employed, the IPS specialist provides supports to the person for as long as he wants and needs that assistance. Other members of the treatment team provide supports as needed, e.g., adjustment in medication, problem-solving therapy. If a job ends for any reason, the IPS specialist offers to help him find another position. IPS specialists also help people with education and adult vocational training programs when clients want to advance their careers.

### 1.3.1 IPS Practice Principles

#### *Practice principle #1: No One is Excluded from IPS*

Gabriel's story (1.1.) illustrates how people are able to work successfully in spite of problems. An overriding principle of IPS is that every person is capable of working at a regular job, regardless of symptoms, substance use disorders, personal presentation, prior employment problems, treatment adherence, homelessness, or other factors. Rather than trying to sculpt people into becoming perfect employees through training and work adjustment programs, IPS specialists help them find jobs that rely heavily on their strengths and minimize possible problems.

#### **John's Story**

John had problems with concentration and memory, but he was very eager to work. His IPS specialist helped him become employed in a restaurant where he performed the same tasks every day. Once he learned his job, John was able to perform it well. However, he had trouble remembering which days he was scheduled to work, so he developed a habit of calling his workplace every morning to ask if he was scheduled to work. John's employer did not mind the calls because she appreciated his reliability.

## ***Practice Principle #2: Competitive Jobs are the Goal***

In IPS, competitive jobs are those that any person can apply for, regardless of disability status. People are paid similar wages to their co-workers who perform the same work. The length of the job is not pre-determined; it depends on whether the employer and working person are both satisfied with their arrangement. Short-term work experiences are not consistent with the IPS approach, but seasonal jobs are fine because other people who do not have disabilities hold seasonal employment. Integrated competitive employment includes jobs that are part of the mainstream labor market

Most people prefer competitive jobs because they want to feel that they are members their communities. Many also say that they want to feel that their skills and abilities are valuable. Another benefit of competitive jobs is the wide range of job types available to suit different skills and interests.

### **Andre's Story**

The first time that Andre got help from a vocational program, he was given a job in a cleaning crew with others from the vocational program. Andre said that he enjoyed earning money, but that it did not feel like a "real job." After six months, he quit. His counselor eventually referred him to an IPS program that helped him obtain a job as a landscaper. Andre reported that he felt comfortable in the landscaping job, especially because he liked to work outdoors.

## ***Practice Principle #3: Employment Services are Integrated with Mental Health Services***

IPS specialists function as members of the mental health treatment team and participate in weekly mental health treatment team meetings. Other practitioners who attend the meetings may include case managers, therapists, counselors, nurses, prescribers, housing specialists, IPS specialists, peer specialists, and the mental health team supervisor. The IPS supervisor may also attend on occasion, and in some areas, state vocational rehabilitation (VR) counselors attend monthly or quarterly. The idea is for everyone working with a client to talk together about how to help the person achieve his goals. During meetings, practitioners share information, celebrate successes, discuss clinical issues that may impact employment, and brainstorm possible solutions to challenges. Not everyone who is discussed during the meeting has an employment goal, but IPS specialists suggest work for other clients who report they are bored, lonely, or struggling financially.

### **Mohamad's Story**

Mohamad was an IPS specialist who felt frustrated in his efforts to help Paula find a job. During the mental health treatment team meeting, he reported that Paula had been cancelling most of their appointments. Paula's counselor thought it was possible that Paula's mother was concerned about Paula working because employment had not gone well for Paula in the past. The counselor offered to set up a meeting with Paula, Mohamad, herself and Paula's mother to discuss Paula's reasons for wanting to work. She anticipated that Paula's mother would feel better if she met Mohamad and learned how he supported working people.

## ***Practice Principle #4: Preferences are Important***

Client preferences play a key role in determining the type of job that is sought, the location and working hours of the job, the nature of support provided by the IPS specialist, the decision about whether to disclose personal information to the employer, and other factors. People who obtain work in their area of interest have higher levels of satisfaction with their jobs and longer job tenure. Some people are interested

in careers that require training or education. In these situations, IPS specialists provide supports for education (see Module 5). Preferences about disclosing a disability to employers are given close attention. Some clients feel it is helpful to disclose their disability to prospective employers and want their IPS specialist to advocate for them with potential employers and maintain contact with the employer after they begin working. Others prefer to keep mental health issues confidential because they believe that they will be able to perform the job well without accommodations or extra feedback from a supervisor. These preferences are honored. IPS specialists help each job seeker consider the possible advantages and disadvantages to disclosing personal information at work. Sample questions for structuring these conversations are in the Sample Career Profile in Appendix A of this workbook.

#### **Agape's Story**

After Agape finished her associate degree in Veterinary Technology, she was excited to begin work. She did not believe that she would need help communicating with her employer, so when she was hired as a veterinary technician she chose not to share information about her mental health or her involvement in an IPS program. Instead, she made plans to meet with her IPS specialist weekly to talk about her job. Agape soon realized that the veterinary office was extremely hectic, and she began to worry that she was not performing well at work. When she spoke about possibly quitting her job, her IPS specialist suggested that he could help her talk to her employer. Agape liked this plan and agreed to tell her supervisor, Dave, that she was working with an "employment counselor" who would soon call Dave. The IPS specialist phoned Dave and said, "I am an employment counselor who helps people return to work and I understand that Agape has told you about me. I was hoping that the three of us could meet for 20 or 30 minutes so that I can explain my role and we can talk together about how to support Agape so that she can be an excellent employee." Before the meeting, Agape and her IPS specialist discussed what would remain confidential, and what was important for Dave to know.

### ***Practice Principle #5: Benefits Counseling is Offered***

All people who receive disability benefits, or other entitlements, are offered opportunities to meet with a trained work incentives counselor to learn how earned income will affect their benefits. They receive individualized information that shows their total income based on different levels of wages. People who do not have disability benefits are provided with information about the long-term effects of living on disability benefits and they are encouraged to try employment before applying for entitlements.

#### **Taylor's Story**

Taylor told her care manager that she felt bored and lonely. But she did not want to work because she was concerned about losing her Social Security Income (SSI) and Medicaid. Her care manager referred her to a benefits planner who explained that Taylor could work part time and receive a smaller amount from SSI along with her Medicaid. He showed her different written scenarios to demonstrate that although her SSI checks would be smaller, her total income would be larger than if she did not work. And he said that if she would like to work full time, she could meet with him again to learn how to exit the benefits system.

### ***Practice Principle #6: The Job Search Begins Rapidly***

To help a job seeker find the right job, the IPS specialist asks about his work preferences, job history, education, and other information. She also speaks to mental health practitioners, and with his permission, his family. In fact, IPS specialists frequently meet with job seekers and their identified family members (or other supporters) to brainstorm what jobs the person may enjoy. She later records this information in a Career Profile which is typically completed in two or three meetings.

The IPS specialist and/or job seeker has in-person contact with a hiring manager within about 30 days of the person starting IPS services. No one is asked to complete job readiness groups, job tryouts (situational assessments), or other pre-employment services. Rapid job search is crucial for several reasons. Beginning the job search quickly demonstrates to job seekers that their desire to work is taken seriously and conveys that there are opportunities that are the right match for that person. In contrast, when job searches are delayed, people may lose hope that they will become employed and then stop attending appointments with the IPS specialists. When people lack confidence that they can be successful, their fears can best be confronted by visiting workplaces to speak with employers and learn about different options for jobs.

As people try working a job, they learn more about themselves and that information is added to the Career Profile. When jobs end, IPS specialists talk with the worker in a nonjudgmental way about what was learned from the experience, and then offer to help with another job right away.

#### **Andrew's Story**

Andrew's first job was in a department store. He worked from 7:00 to 11:00 each morning unloading trucks and stocking merchandise. But Andrew had a difficult time getting up on time and was frequently late to work. His psychiatrist tried adjusting his medications to help him feel less groggy in the morning, but Andrew still had problems with tardiness. When Andrew was fired, his IPS specialist met with him immediately to talk about other jobs he would like that had afternoon work shifts.

### ***Practice Principle #7: IPS Specialists Develop Relationships with Employers***

A key component of job development is building relationships with employers by learning about their business needs and hiring preferences. They make multiple visits to learn about each employer's workplace, her business needs, and positions at the business. This demonstrates to managers that the IPS specialist interested in helping them find the right workers for their businesses. IPS specialists begin building relationships using a four-step process:

1. The IPS specialist visits a business to schedule an appointment with an owner or hiring manager. He explains that he would like to come back to learn more about what type of person tends to be successful as an employee there, so that he can be a resource for good job candidates in the future.
2. During the scheduled appointment, the specialist asks how the business operates, what positions are at the business, and what personal qualities and work experience make people successful in those jobs. The specialist does not describe his program at length, but answers the manager's questions, if any, about IPS. They do not ask about job openings because they have not yet developed a relationship with the manager.

3. After the appointment, the specialist reflects on the stage of the relationship with the employer. Does she seem eager to meet a candidate or is she unsure about working with an employment program?
4. The IPS specialist either returns to discuss a job seeker or continues working on the relationship by making more visits to the employer.

#### **Melissa's Story**

Melissa was an IPS specialist who knew a job seeker who wanted employment in a hair salon. She made a list of all the hair salons that were one bus ride (no transfers) from the job seeker's home and began visiting them. During her scheduled appointments with salon managers and owners, she asked questions such as, "What are your goals for your business?" "What is a typical day like for a receptionist here?" "What qualities make an excellent receptionist?" "What have been challenges for people in those positions?" At one salon, the owner mentioned that a receptionist quit recently, and she would be hiring a new person right away. After the appointment, Melissa quickly made plans to meet the job seeker and helped her complete an application. Two days later, Melissa returned to the salon to say, "I thought about your need to find friendly people who are organized and fashionable. I think I do know someone like that. Can I tell you a little bit about her?" She gave the manager a copy of the job seeker's résumé and explained the job seeker had already submitted an application online.

### ***Practice Principle #8: Individualized Job Supports are Time Unlimited***

Job support plans are designed for each person based on her strengths, resources, experience, lessons learned from past jobs, symptoms (if any), and substance use (if any). Examples of types of job supports include help arranging for transportation, assistance responding to feedback from supervisors, encouragement to ask for promotions, help requesting accommodations such as a schedule change, family meetings to discuss progress at work, and assistance reporting earnings to administrators of disability benefits.

Job supports are provided for as long as the worker wants and needs them, typically for a year on average. During the first few weeks of working a job, supports may be intense and then gradually less frequent. Eventually, a practitioner on the mental health team or another support person may be selected to provide job assistance on a long-term basis or as needed and desired.

#### **Earl's Story**

Earl was 16 years old when he found his first job in a sandwich shop. He did not believe he needed any job supports and did not want to keep in touch with the IPS specialist. After three weeks he lost that job and called the IPS specialist to ask for help finding another job. The specialist helped him find a job in an ice cream shop a few blocks from his home because Earl loved to talk to people. This time Earl agreed that his IPS specialist could stay in touch with his supervisor. Early on, the supervisor reported that Earl was taking too many breaks and texting during his work shift. Earl agreed that he would turn his phone off during his work shift so he would not be tempted to return messages. The IPS specialist helped out with two other small problems and continued to meet with Earl until he had worked for eight months without any issues on the job. At that point, Earl said that he was ready to work on his own, and Earl's care manager offered to provide work supports if he needed them.

### 1.3.2 Strengths-based Services

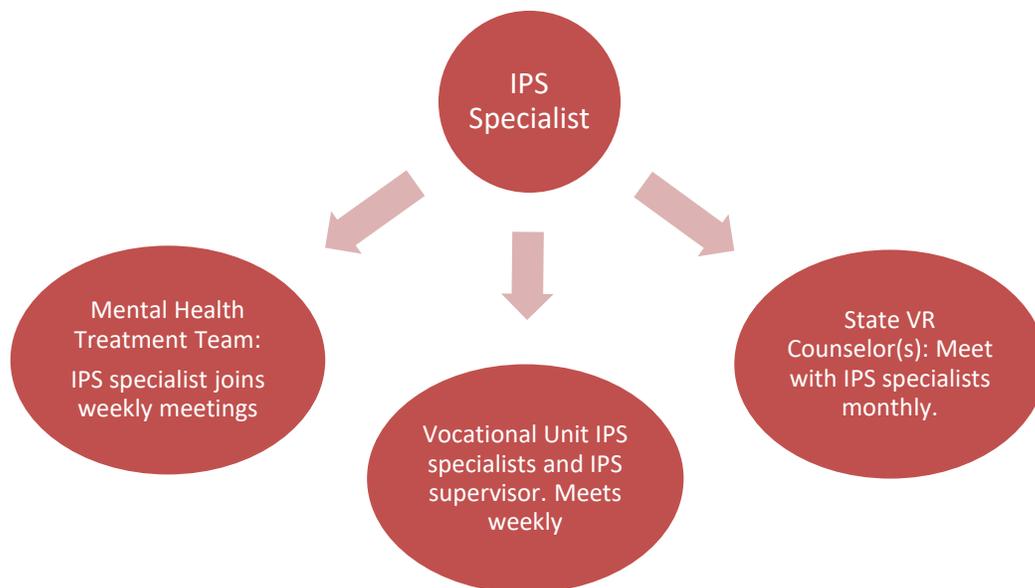
People succeed at work and school by building on their strengths rather than focusing on problems. None of us excel in every aspect of our jobs, but we are successful nonetheless because our strengths make us valuable in the professions we have chosen. IPS specialists recognize that each person has strengths, talents, experiences, and abilities that will be valued in the workplace. Examples of strengths include a strong work ethic, persistence, a friendly personality, job-specific skills, or work experience. A person's interests can also be strengths. And resources such as supportive friends, work tools, or a phone are also strengths. When IPS specialists are unsure how to help someone reach his goals, they stop to reflect on the person's strengths.

### 1.3.3 Community-based Services

IPS specialists spend most of their scheduled working hours away from the office. They meet people at their homes, libraries, coffee shops, malls, workplaces, state vocational rehabilitation offices, family homes, parks, and other places in the community. IPS is about helping people integrate into their communities through work, so that is where services are provided. When people begin to disengage from IPS services, it is especially important to meet them where they like to go already. Appointments should be convenient and comfortable for clients of IPS services. And IPS specialists learn about interests by meeting people away from the mental health office.

## 1.4 Organization of Services

As described above, IPS specialists are integrated with mental health treatment and meet with the mental health treatment team weekly. But IPS specialists are also part of the IPS team (called the Vocational Unit) and they collaborate with state Vocational Rehabilitation counselors.



### **1.4.1 Vocational Unit**

The vocational unit consists of at least two full-time IPS specialists who report to the same supervisor. They meet weekly to celebrate successes, brainstorm possible solutions to difficult situations, and share job leads. The advantage of the vocational unit is that IPS specialists can learn from their colleagues and provide coverage for each other when one is away from work. The supervisor is knowledgeable about IPS and coaches new team members on developing employer relationships and other needed skills for the job. At the start of IPS services implementation, it may not be possible for every agency to hire two full-time specialists. In these cases, agency administrators monitor demand for the program and create a second IPS specialist position as soon as they are able to do that.

Some vocational units also include one or more peer specialists. Peer specialists are people with similar life experiences to those served. Peer specialists with lived experiences of mental illnesses share how they overcame challenges to work and school and share hope that clients can achieve their employment goals.

### **1.4.2 Integrated Mental Health and IPS Services**

Services are organized so that each IPS specialist is assigned to one or two mental health treatment teams from which she receives referrals. Her office space is with, or near, mental health practitioners so that they can connect between weekly meetings.

### **1.4.3 Collaboration with State Vocational Rehabilitation Counselors**

Each state and U.S. territory has an office of vocational rehabilitation (VR) with counselors who help people with disabilities work. IPS programs typically collaborate with VR offices because many people have open cases in VR and IPS simultaneously. In these situations, each partner brings his own expertise and resources to help people succeed. VR counselors know about all types of disabilities and chronic illnesses which is helpful to people who have multiple disabilities. And they are often familiar with many different types of jobs, employers, and education programs. In some circumstances, VR counselors are able to authorize funding to the IPS program for services based on each person's employment plan.

## MODULE 2

### Engagement, Benefits Counseling, and the Career Profile Training Notes and Exercises

#### 2.0 Training Notes for IPS Supervisors and Trainers

Who to invite:	IPS specialists and IPS peer specialists (if applicable)
Length:	One hour
Material to share with participants one week in advance:	Module 2 (reading material)
Materials to be copied:	Vignette: Joe’s Job Search (follows this training outline) A client’s employment plan with his name removed (someone currently served by the IPS team)
Equipment/supplies needed:	Flip chart and marker
Training Outline:	<p>I. Discussion: Facilitator asks the group to name different places they have met with clients in the past few days. How many appointments have been in the community during the past three days? What other community locations could be used? (Possible answers: coffee shops, libraries, businesses, state VR office, workforce center, client homes, family homes, parks, the mall, school/colleges, places a client likes to go.) What are the advantages to meeting people in the community as IPS specialists are getting to know them? (Possible answers: learn about the person’s interests as you see things in the community, person may be more comfortable and enjoy appointments by going places he likes, appointments may be more convenient for clients.) What gets in the way of meeting people in the community? What would everyone’s schedules look like if we spent at least 65% of our time in the community? (Possible answers: about 5.5 hours per day out of an 8-hour workday, IPS specialists may start and end the day in office but be out and about in between.) Team sets a goal to increase their time in the community. IPS supervisor makes a note to begin checking in with staff during individual supervision and once each month during the vocational unit meeting. 15 minutes.</p> <p>II. Vignette: Joe’s Job Search. Ask the team to break into groups of three, or if the team is too small to break up, discuss his vignette together. (Possible answers: Accompany Joe on his morning walk to discuss the different businesses he passes each day. Are there any that appeal to him? Brainstorm jobs that would not require Joe to work with the public and would not require Joe to work in religious environments. Think about morning jobs since Joe likes to be out and about in the morning. Once Joe</p>

	<p>has identified some possible businesses, visit those places with him. For example, ask a manager to meet with the two of you for 15 minutes to learn about different jobs there. Also, talk to the mental health treatment team about strategies to help Joe manage stress, for example, relaxation exercises or meditation.) 20 minutes.</p> <p>III. Ask the group to brainstorm a list of 15 questions they can use to ask about a person’s education. Write down their questions on a flip chart. Next, ask them to identify which questions are open-ended and which are close-ended. 10 minutes.</p> <p>IV. IPS supervisor passes out the job search plan for a person currently served by the team (name removed). She asks the group, “Is any part of the plan in the person’s own words? Can you describe his interests from looking at the plan? Can you tell who will do what each week to help him find a job? Can you figure out whose plan this is by the information in the plan? How individualized is this plan?” Team discusses how they can make plans more meaningful for participants. 15 minutes.</p>
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## Module 2 Vignette Joe's Job Goal

Joe lives in a housing program for people who have been chronically homeless. He hears voices and sometimes sees signs from God. He does not take medications because he believes he has special powers and does not want the medication to ruin that. In spite of his symptoms, Joe has not been hospitalized in many years. He does use alcohol and crack cocaine at the beginning of the month when he receives his disability payment.

Joe's most recent job was working in a Jewish bakery. He was trained there and still has skills for baking. He did well for a while and staff thinks that is, in part, because it was a small, family-owned business. Ultimately, the job did not work out as he began to incorporate religious ideas into his delusions.

Joe is personable and many staff at the housing agency like him very much. They describe him as sweet and social with people whom he knows. He does not typically talk about his psychotic thoughts unless he is asked directly about his symptoms, numbers, or religious topics. Joe likes to be in familiar places and does not leave his neighborhood alone. Joe is smart. And, in spite of his symptoms he is able to concentrate and follow directions. Other information about Joe is that he wakes up every morning and walks for five miles (the same route around his neighborhood). He goes to parties and events in his supervised apartment building, but he doesn't have many social supports.

Joe is currently ambivalent about work and cancels many appointments with his IPS specialist. Staff believe he is nervous about employment and meeting new people.

What was learned about Joe as a worker from his experience at the bakery?

What are some of Joe's preferences?

How can the IPS specialist help Joe explore different options for jobs?

## MODULE 2

### Engagement, Benefits Counseling, and the Career Profile

#### 2.1 Referral

The referral process for IPS services should be simple so that people who want to work can meet an IPS specialist quickly. Ideally, when a person expresses interest in a job, the mental health practitioner coordinates an appointment time with the IPS specialist so that the three of them can meet together. The IPS specialist asks about the person's interest in work. What type of work does he think he would like to do? What does he hope to get out of working a job? Does he have any concerns about working a job? She also shares information about how she helps people with jobs and careers. If the client is interested in working right away, the IPS specialist sets up an appointment to meet with him within a week. If he would like to wait, the mental health practitioner will let the IPS specialist know when the client is ready to talk again.

Eligibility criteria for IPS is based on desire to work. People are eligible for IPS services regardless of symptoms (if any), substance abuse (if any), prior problems with employment, homelessness, personal presentation, or other issues.

##### Caleb's Story

Caleb is a 20-year-old man with co-occurring disorders of schizophrenia and substance use disorder. During a mental health treatment team meeting, Caleb's care manager reported that he has expressed interest in getting a job. The care manager also described his concern that Caleb could increase his alcohol and marijuana use if he earned money.

If you were Caleb's IPS specialist, what would you do? While there is no single correct answer for Caleb's situation, a few ideas are listed below:

- Meet Caleb to learn about his work interests, prior work experiences, and other factors related to employment. As you get to know him, ask what ideas he has for being sober at work.
- Encourage Caleb to look for jobs that support sobriety. Do not suggest workplaces where alcohol is served.
- Speak with the mental health treatment team and Caleb to learn about Caleb's drug and alcohol use. What time of day is he at his best? Has he ever been able to reduce his drug and alcohol use in the past? Are there safety concerns related to Caleb's work interests? What type of situations/environments tempt Caleb to use drugs or alcohol?
- Speak with the mental health treatment team about how they can help Caleb use his earnings to buy things he wants so he will have less money available for alcohol and marijuana.

#### 2.2 Engagement

IPS specialists engage new clients by making appointments as convenient as possible. They offer to meet with people in the locations of their choice (see Module 1). And they schedule appointments when it is easier for clients to attend, for example, a specialist would schedule mid-day appointments for a single parent who had school-age children.

During appointments, IPS specialists focus on whatever career-related topics are most important to a person. When a young person wants to begin job searching immediately, the IPS specialist does not insist that they spend several appointments working on the Career Profile (see below). Instead, the specialist

gathers information for the profile as they start the job search and she adds it to the Career Profile between appointments.

Another way that IPS specialists engage people is by expressing hope that the person will be able to achieve his career goals. They do not say, “You will not find a job if you do not stop using drugs because employers drug test applicants.” Instead, they offer different options such as applying for jobs at businesses that do not drug test or trying a period of sobriety during the job search. And they identify strengths that each job seeker has related to working a job.

When specialists have difficulty contacting people for appointments, they use a variety of approaches to get in touch. IPS specialists call, text (depending on agency policies), make community visits, and contact family members (with prior permission). They know that some people who want to work may lack confidence or hope that their goals will be realized, so they are persistent in their efforts to reach people. The specialist also connects with the mental health treatment team to ask why the person has not been available for appointments.

#### **Manuel’s Story**

Manuel has been referred to IPS. He is 34 years old and has schizophrenia. The last job he held was seven years ago when he worked for three weeks as a dishwasher before being fired for unexcused absences. Manuel wants to work because a job would give him something to do with his time and he would like to be able to buy a car. On the other hand, Manuel is worried that he will lose his Social Security Disability Insurance if he works, and he also feels unsure that he will be able to handle the stress of employment. Manuel’s parents are also concerned about whether employment will cause Manuel to have more symptoms related to stress.

If you were Manuel’s IPS specialist, what would you do? While there is no single correct answer for approaching Manuel’s situation, some possible solutions are listed below:

- Spend two or three appointments getting to know Manuel. This time together may also help Manuel become more comfortable with you. Meet with Manuel in different community settings (library, coffee shops, walks together) so that you can discuss different working people you see. Which jobs does he think he would like, and what jobs would he dislike?
- If Manuel agrees, meet together with Manuel and his parents to learn more about their ideas for a good job match. Talk about what has worked for Manuel on previous jobs, and what has not been helpful to him. Explain that you will attempt to be thoughtful about the right job match for Manuel in order to minimize stress. And explain the type of job supports you can offer. Ask Manuel and his parents when they would like to meet again.
- Speak with the mental health treatment team about the family member’s concerns. Ask mental health practitioners how they can support Manuel’s employment goals, and how they can help him manage stress. Ask for their ideas about the right job match.

### **2.3 Benefits Counseling and Management**

People need accurate information in order to make decisions that will affect their finances. When clients consider a return to work, they should have access to a trained benefits counselor (sometimes referred to as a certified work incentives counselor or CWIC for short) who can provide individualized information about the consequences of earned income. Benefits counseling should take all sources of entitlements into consideration. These may include food stamps, housing subsidies, and medical benefits.

IPS specialists should not attempt to provide benefits counseling themselves unless they have in-depth training in this area. The rules about benefits are detailed and change frequently. IPS specialists may attend benefits counseling meetings with their clients so they are knowledgeable about the person’s financial goals as they relate to employment.

The role of the IPS specialist is to help people report their earnings to the different entitlement systems. They must learn when and how to report earnings because it is more complicated than it may appear. Benefits planners can share how to report benefits.

#### **Anne's Story**

Anne is a 38-year-old woman who receives Social Security Disability Insurance (SSDI) and Medicare. When she began working with an IPS specialist her goal was to find part-time employment as a stocker in a store. A benefits planner gave her information about how many hours she could work each month if she wanted to keep her SSDI benefits. But that information was based on earning close to minimum wage. As Anne's job search progressed, she became interested in other types of work. The IPS specialist referred Anne to Vocational Rehabilitation (VR), and her VR counselor helped pay for a certification program to become a forklift operator. Anne's wages will start out at least \$6.00 per hour above minimum wage and will increase as she gains experience.

If you were Anne's IPS specialist, what would you do? While there is no single correct strategy to help Anne, some strategies are listed below:

- Help Anne schedule an appointment with a trained benefits counselor. If needed, ask her VR counselor to authorize benefits planning with a local benefits counselor.
- Ask Anne who should attend the appointment with her. Does she have a partner or other family member who is concerned about her disability benefits? If not, offer to go with her.

#### **Jayla's Story**

Jayla is a 19-year-old woman who has recently been diagnosed with schizoaffective disorder. Her parents think that she should apply for Social Security Income so she will have medical benefits and the safety net of a monthly check.

If you were Jayla's new IPS specialist, what would you do? While there is no single correct answer for helping Jayla consider her options, a few ideas are listed below:

- Learn more about Jayla's work and career interests.
- Meet with Jayla, her parents, and her mental health practitioner to talk about possible employment. Explain that fewer than three percent of people ever exit the disability system in order to work. Describe how signing up for Social Security Income is signing up for a life of poverty, poorer health and poorer mental health outcomes. Suggest that Jayla can try working now because she can always sign up for benefits later if she decides she needs that support.

## **2.4 The Career Profile**

The Career Profile is a document that collects information about a person's career goals, education history, employment history, living situation, mental health, and other factors that can affect a job. IPS specialists complete the career profile as they are getting to know each new person who participates in IPS services. And they update the profile with each job start, job end, education/training experience, and other key information. The purpose of recording this information is so that mental health practitioners and future IPS specialists will know what the person has learned from each experience. IPS specialists ask about past experiences to learn about a person's strengths and what conditions are mostly likely to help him succeed. When talking about a past job, they ask questions such as, "What did you like most about that job?" "What did you like least?" "How did you get along with your co-workers?" "What kind of feedback did you hear from your supervisor?" and "Why did the job end?"

During the first few weeks that an IPS specialist gets to know a new client, she focuses on building a relationship with him, rather than filling out the Career Profile. She does not bring the form to appointments or attempt to fill it out in one session. Instead, she uses active listening skills (see below) to

encourage him to explain what he has learned about himself as a worker and student. A sample Career Profile and forms to update the profile are in the appendixes of this workbook.

IPS specialists also gather information from family members who know the person well. Family members may refer to parents, partners, spouses, siblings, adult children, good friends, AA sponsors, or others identified by the client. IPS specialists offer to invite a family member to an appointment with a client to brainstorm possible ideas for good job matches.

IPS specialists also discuss the client's preferences for sharing personal information with an employer. Some clients would like their specialists to share general information about their disability with employers because they think they may need a job accommodation. One client had not worked for more than 10 years when he began applying for jobs. He wanted his IPS specialist to help him speak with prospective employers about the gap in his work history, and he also thought it would help if she could describe his strengths as a worker. Other clients may not want their IPS specialists to have any contact with employers, possibly because they are concerned about stigma or because they do not believe that they need that type of help. IPS specialists ask each person about her opinions regarding the possible advantages and disadvantages to disclosing a disability to an employer. When clients are interested in sharing personal information, the specialist and client discuss what information should be kept private. The sample Career Profile in Appendix A of this workbook includes questions that IPS specialists can ask about disclosing mental health information to employers.

#### **Jared's Story**

When Jared met with his IPS specialist, he spoke about his goal to earn a high wage. He had just completed high school and he was interested in a certificate program at the community college. Jared's IPS specialist suggested that she would like to meet his parents to learn more about his experiences as a student, but Jared said he did not think that would be necessary.

If you were Jared's IPS specialist, what would you do? While there is no single correct response for how to help Jared consider involving a family member, a few ideas are listed below:

- Ask Jared, "If you got a letter telling you that you had full tuition to whichever training program you wanted, who would you call first?" (When clients have work goals, IPS specialists can ask, "If you got a job offer tomorrow, who is the first person you would call?")
- Explain that if there are any topics that Jared does not want to discuss with family members, you will not bring those up.

## **2.5 Active Listening Skills**

Listening is a critical skill for IPS specialists. Not only do they need to listen carefully to their clients, but they also need to be good listeners when meeting with employers to learn about their businesses. Superior listening skills are more important than giving advice. In this section, we briefly describe two basic listening skills, but we hope that as you progress in your career, that you will continue to learn more about active listening.

### ***Ask open-ended questions.***

There are two types of questions: close-ended and open-ended questions. Close-ended questions can be easily answered with one or two words such as "yes" or "no." For example, "Did you go to school today?" is a close-ended question. Open-ended questions encourage the other person to share more of his thoughts. Examples of open-ended questions are, "What is it about English class that you enjoy?" or "Who are your school friends?" The goal is to encourage the person to share more of her thoughts and feelings. Strive to incorporate open-ended questions in your conversations so that you can learn more about your client's perspectives.

### **Cindy's Story**

Cindy is an IPS specialist who wants to do a better job of listening. She is trying to replace some of the close-ended questions she uses frequently with open-ended questions.

If you were helping Cindy improve in this area, what suggestions would you make to improve the questions listed below?

- Do you like your job?
- Do your parents want you to work?
- Do you want to work?
- What job did you work the longest?

There is no single way to ask good questions, but some examples are in italics below:

- Do you like your job? What do you like about your job? What do you dislike about your job? How does it feel to go to work in the morning?
- Do your parents want you to work? Which family members are closest to you? How do they feel about you getting a job?
- Do you want to work? What would be the advantages to working a job? What concerns do you have about working a job? How will you know when it is the right time to get a job?
- What job did you work the longest? What factors have led to your success on previous jobs? What type of work environments suit you best? What type of supervisor do you like?

### ***Avoid giving advice.***

As you gain experience as an IPS specialist, you will begin to have opinions about effective strategies people can use to succeed at work and in school. But rather than telling people what you think is the best way to solve problems, learn each client's opinions about how to best move forward. People are more likely to follow through with plans that are based on their own preferences. Also, if you rush to give advice, you may not fully understand what is important to the person or know the reasons he had for doing something his own way. Finally, when people disagree with advice they may not object verbally, but they may not follow through on suggestions they did not agree with in the first place.

### **Antoine's Story**

Antoine recently began work as a delivery person. He told his IPS specialist that he enjoys his job although he thinks that his supervisor does not like him. He feels that way because his supervisor has not told him that he is doing a good job, and his supervisor does not smile or seem friendly with Antoine.

If you were Antoine's IPS specialist, what would you do? While there is no single correct answer for Antoine's situation, a few ideas are listed below:

- Ask Antoine what he would tell a friend to do in a similar situation.
- Ask Antoine what ideas he has for getting feedback from his boss. List his ideas, and then ask him about the possible benefits or drawbacks for each idea. Help him choose his best idea and make a plan for him to do it.
- If Antoine is uncomfortable talking to his boss on his own, offer to introduce yourself to Antoine's boss and ask for a brief meeting with Antoine. During the meeting ask Antoine's boss what is going well, and whether Antoine can improve his performance.

## **2.6 Job Search and Education Plans**

After an IPS specialist and client spend a few appointments getting to know each other and discussing the client's goals, they develop a written job search or education plan. The purpose of the plan is to outline what steps each person will take to help the client achieve her goals. IPS specialists offer clients a copy of the plan.

Plans are meaningful to clients when they are specific. If the IPS specialist will contact employers on the job seekers behalf, how many employers will the specialist meet with each month? How will the IPS specialist help the job seeker follow up on applications? How often will they meet? The plan should also include information about the type of job the person wants. A goal for “part-time employment” is vague and the client may feel that the IPS specialist did not listen to her preferences for a job. Below is an example of a job search plan that is individualized.

### Sample Employment Plan

Person’s name: Therese Ocasio Date: March 1, 2020

Goal: “I want to be physically active and I would like to work outdoors. I prefer full-time work, but I will take a job that offers at least 30 hours.”

Businesses of Interest: City Parks Department (Avon and Sheffield), Handel’s Landscaping, Baker Landscaping, Green Day Growers, Vista Golf Course, Lakefront Golf Course,

Action Steps	Person(s) Responsible:	Projected Date:
1. IPS specialist (Darren) will meet with at least two employers each month to learn about jobs and hiring preferences. He will share what he learns with Therese and request employer meetings at businesses that interest Therese.	Darren Williams	3/1/2020 to 6/1/2020
2. IPS specialist and Therese will meet twice to write a resume and cover letter.	Darren Williams and Therese	3/21/2020
3. IPS specialist will schedule a meeting with a benefits planner that Therese and her mother can attend together.	Darren Williams	3/30/2020
4. IPS specialist and Therese will meet weekly to apply for jobs and follow up on job applications together.	Darren Williams and Therese	3/21/2020 to 6/1/2020
5. Therese will complete at least one application on her own each month.	Therese	4/1/2020 to 6/1/2020

Darren Williams, March 1, 2020      Therese Ocasio, 3/1/2020

IPS Specialist Signature      IPS Client Signature

Every few months, the IPS specialist and client review her progress and decide whether the strategies they are using have been effective. They may also talk about whether the client would like to revise her goal. The written plan is updated to reflect changes in goals and action steps.

## MODULE 3

### Learning About Different Occupations

#### Training Notes and Exercises

### 3.0 Training Notes for IPS Supervisors and Trainers

Who to invite:	IPS specialists and IPS peer specialists (if applicable)
Length:	75 minutes
Material to share with participants one week in advance:	Module 3 (reading material)
Materials to be copied:	Vignette: Janice’s Job End (follows this training outline)
Equipment/supplies needed:	Flip chart and marker
Training Outline:	<ol style="list-style-type: none"><li>I. Discussion: How did each of us choose our careers? How did we know about different options that were available to us? What else would have helped us make good choices? 10 minutes.</li><li>II. Group divides into pairs. They each talk about two jobs that they have had and what they learned about themselves as workers as a result of those jobs. Large group gathers and facilitator asks if anyone would like to share what they learned from a job experience. 20 minutes.</li><li>III. Discussion: Has anyone on the team ever set up/attended an informational interview for an IPS participant? Has anyone ever visited with an academic advisor to learn more about a job type? What did you do? What was learned? 10 minutes.</li><li>IV. Vignette: Janice’s Job End. 15 minutes. Possible answers: 1) Janice is reliable, accurate, and she interacts well with others. She becomes bored with jobs that become routine. 2) Janice may like a certificate in medical billing and coding, or she may enjoy working as a medical clerk who manages records. Another possibility is a medical lab technician. Her IPS specialist should also learn why she did not like patient care as a certified nursing assistant—it is possible that she would like medical reception jobs since she enjoyed working with customers in the department store? The IPS specialist can also talk to state Vocational Rehabilitation counselors and offer to set up appointments with community college advisors for more ideas.</li></ol>

	<p>V. Review the team caseload with the group and help them identify who may benefit from learning about different jobs. Make a plan with the IPS specialist(s) to propose to the clients. OR help the team select one or two occupations that they would like to know more about and make plans for the team to learn about those fields together. Ask the team to set a goal for when they will accomplish their plan. Write action steps and dates on flip chart. 15 minutes.</p>
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## MODULE 3

### Learning About Different Occupations

#### 3.1 Why Career Exploration is Important

Career exploration refers to learning about the duties, working conditions, availability, earning potential, and education/training requirements of different jobs that may interest a person. Although many IPS clients know what type of work they would like to do, when someone is unsure, an IPS specialist may suggest learning about some different jobs together. They do this by visiting workplaces and, possibly, training programs. The reason for making visits is that reading about a job is abstract while visiting workplaces allows the client to ask questions, observe workers, and learn about the working environment.

While working on the Career Profile, IPS specialists ask about the person's interests and how he likes to spend his time. Examples of questions they ask include:

- What are your hobbies or interests? How do you spend your free time?
- What jobs would you dislike?
- What jobs do you know about? What types of jobs do friends and family members hold?
- What positions would you like to learn about?
- Are you interested in education or training? What programs would you like to know more about?
- When are you available to work? What is your best time of day?
- Where do you spend your time now?

When a person does not know what type of work she would like to do, her specialist gains clues from questions about his interests. He may suggest some different job types that may interest the person. If the person expresses interest in any of those positions, the IPS specialist suggests workplace visits to learn more about those occupations.

#### Clarita's Employment Goal

When Clarita met with her IPS specialist for the first time, she said that she was interested in a cleaning job. As she spoke about her work history, it became clear that all of her previous positions were cleaning jobs. Clarita's IPS specialist began to wonder if Clarita lacked confidence that she could work other jobs. He asked why Clarita liked to clean and Clarita responded that it was easy to find cleaning jobs. The IPS specialist discovered that Clarita loved to bake and made special cakes and desserts for many family occasions. He also learned that Clarita loved being with children and frequently babysat for her extended family.

If you were Clarita's IPS specialist how would you help her explore different options for employment? There is no single correct answer for this situation, but a few ideas are below:

- Offer to visit a bakery in a grocery store to learn what qualifications are needed to work there. Also, offer to visit a cake shop to learn about a different type of bakery. If Clarita expresses interest in learning more about baking, suggest visiting a culinary program to learn about cake decorating or baking.
- Discuss whether Clarita would like to learn about different jobs in childcare. Visits could be to after-school programs and day care centers. Clarita's IPS specialist could also help her explore different training and education programs related to childcare.
- Suggest meeting with Clarita's family members to talk about other interests and strengths that may relate to working a job.

Career exploration is also helpful to IPS specialists because none of us knows about all of the types of jobs in our communities. Learning about job types helps with individual job matching. IPS specialists can visit workplaces to learn about jobs with clients or on their own.

### **Shelby's Story**

Shelby is an IPS specialist. She is working with a young woman who is finishing her certificate in Computer Maintenance Technology. Shelby only has a vague idea of what a person would do with that certificate. She would like to prepare for her client's job search.

If you were Shelby, what would you do? While there is no single correct answer, a few ideas are listed below:

- Shelby could visit the community college to talk to an advisor in that program. During the appointment, she would ask what types of businesses hire people with that certificate. She would also ask about the job(s) a person may be hired to do and what those jobs entail.
- Shelby could talk to a state Vocational Rehabilitation counselor to ask what he knows about the types of jobs available for workers with a Computer Maintenance Technology Certificate.
- Shelby could talk to someone in the IT department of her agency, or her friends and family who work in Informational Technology.
- Shelby could also visit a couple businesses that hire people with Computer Maintenance Technology. She would bring a list of questions to ask (see the list of questions in 3.2.).

## **3.2 Informational Interviews**

Informational interviews are meetings with working people or managers to learn about a specific type of work. It is understood that the client is not interviewing for a job opening. If an IPS specialist was helping Clarita explore baking jobs, he would call a bakery manager to say, "I am an employment counselor, and I am working with a young woman who loves to bake and thinks that she may be interested in working in a bakery. She would like to know more about what it is like to work in a professional bakery, so I called to ask if we can schedule a 20-minute appointment to talk to you about what it is like to work in a bakery, and what different positions are available in bakeries." Next, the IPS specialist would help Clarita prepare for the appointment by developing a list of questions to ask during the interview. The following are examples of questions they may ask when they visit the bakery:

- What are different positions in this bakery?
- What type of training or experience do the bakers have?
- What skills are most important?
- What is a typical workday for the bakers? For the counter helpers?
- What are the duties/functions/responsibilities of the bakers?
- Are there busy and slow times, or is the pace fairly constant?
- What do people like most about the baking job?
- What do people find most challenging?
- What type of person would love this job?
- What changes are occurring in this field?
- How easy or difficult is it to find employment? What would help a candidate to stand out from others?

- What opportunities for advancement are available?
- What else do you think I should know about this career?
- Would it be possible to take a look at the kitchen?

The people Clarita interviews may become networking contacts later when she is searching for a position. Clarita should dress as if she is interviewing for a position and take a few notes during the informational interview. She should also send a thank-you note after the visit.

### 3.3 Visits to Community Colleges and Training Institutions

Another way to learn about careers is to visit community colleges, training institutes and four-year colleges. IPS specialists and prospective students meet with academic advisors to ask about programs that sound interesting to the student. When programs involve hands-on learning, for example, Computer Numerical Control (CNC) training, they may ask to visit the lab where students are working on mills and lathes. Just as in informational interviewing at businesses, they prepare questions to ask. Sample questions are below.

- What types of jobs would this program prepare me to do? What are typical duties for people in those positions? What types of businesses hire people to perform that type of work?
- What is the job outlook for this type of work? How many graduates find work in this field?
- What are other similar degrees or certificates? Are there any shorter programs in this field?
- What is the typical salary for people in this profession?
- Is the learning primarily in a classroom or hands-on training? Is an internship or work experience part of the program? (Some students may also want to learn if background checks are required for work experiences.)
- How many semesters or months will it take to complete the program? How many credits are required for graduation? For certificate programs, how many weeks/months long is the program? What is the course schedule? Is it possible to take a part-time schedule?
- When are courses offered? When does the program begin? Must the courses be taken in order?
- What are the eligibility requirements for this program?
- For certificate programs: Is this program eligible for federal financial aid?
- Which classes do students find most challenging?
- What percent of students graduate?
- How many students are in the classes?
- What is the cost of this program? What books, tools, or equipment do I need to purchase to complete the program?

Many colleges hold open houses in different program areas. To learn about open house events, watch college websites, and call advisors to learn what is scheduled and whether attendees must register in advance.

### 3.4 Career Exploration Through Volunteer Jobs

Some employment programs assist with volunteer jobs and unpaid internships to help clients learn about different occupations. But IPS focuses on regular, paid employment and educational opportunities instead. Many people feel frustrated with unpaid positions. Further, an IPS client should not be required to complete extra steps to pursue a career but should take the same path as everyone else. When a client asks for help with volunteer positions to learn about different types of work, IPS specialists suggest workplace visits or just trying a job as a regular employee instead.

#### Destinei's Employment Program

Destinei supervises an employment program that helps people with regular jobs. The program also offers volunteer positions to people who want to start slowly. And staff members set up time-limited "internships," which are essentially volunteer jobs, for people who want to try different types of work. Destinei and her staff believe that people who participate in volunteer jobs and internships will eventually move on to paid employment. When an IPS trainer visited the program, the trainer suggested keeping track of how many people actually transition from volunteering to competitive work. Destinei reviewed program records for the past two years and discovered that only 15% of volunteers had become competitively employed. Destinei discussed what she had learned with the IPS team. The specialists explained that some volunteers dropped out of the employment program, and others became so comfortable volunteering that they never wanted to leave those positions.

If you were Destinei, what would you do? There is no single correct answer, but some possible strategies are listed below:

- Destinei could meet with her supervisor to discuss her findings. She could propose that the IPS program discontinue support for volunteer jobs and "internships," so the specialists could direct all of their efforts towards helping people with paid employment.
- Destinei and her supervisor could meet with the agency clinical director to describe the program change before announcing it to case managers and counselors. They could also propose that care managers can help people who want to start out with volunteer jobs and refer people to IPS when they feel ready to try competitive employment.

# MODULE 4

## Supported Education

### Training Notes and Exercises

#### 4.0 Training Notes for IPS Supervisors and Trainers

Who to invite:	IPS specialists and IPS peer specialists (if applicable)
Length:	4 to 5 hours
Material to share with participants one week in advance:	Module 4 (reading material)
Preparation:	<p>Schedule an appointment (on the day that you will conduct the training) with the Office for Students with Disabilities at a local school. Ask for one hour so that staff can learn more about the office and can share how they will help students on their caseloads. Prepare questions that you and the team can ask such as the following:</p> <ul style="list-style-type: none"><li>▪ When should students register for services? Before the semester or at any time?</li><li>▪ What documentation is required to apply for services?</li><li>▪ What types of accommodations have the counselors seen that have helped other students?</li><li>▪ With student permission, can IPS specialists participate in some appointments that students have with counselors?</li></ul> <p>Locate a webinar on the FAFSA.gov website.</p> <p>Copy vignette: Marcy's Education Plan</p>
Equipment/supplies needed:	Flip chart and marker LCD projector, speaker, and internet connection
Training Outline:	<ol style="list-style-type: none"><li>I. Brainstorm: What different education and training programs do we already know about in this community? Discuss: What are the advantages to visiting a program in person rather than reading about it online? Establish a goal for each team member to visit one program and share what was learned at a team meeting in two weeks. Help IPS specialists make plans for which program they each will visit and how they will make appointments with advisors. 45 minutes.</li><li>II. Vignette: Marcy's Education Plan. Ask pairs of IPS specialists to read the vignette and develop some possible strategies. Reconvene the group and discuss the ideas generated by each pair. <i>(Possible answers: 1. Ask Marcy what she liked about the hostess job. What are her interests? How does she spend her time now? What classes did she like in school? What classes didn't she like? Ask for permission to speak with a high school teacher to gain a better understanding of how she learns best. Suggest a family meeting to</i></li></ol>

	<p><i>talk about possible good job matches. Ask Marcy to talk about people she knows who work and what they do. Arrange workplace visits so that Marcy can begin to learn about jobs that involve helping others.) 30 minutes.</i></p> <p>III. Show the FAFSA webinar. After the webinar ask questions, such as: What documentation do students need to complete the application? How often must the application be completed? What is the report that students receive after an application is approved? After the application is completed, where should students go to have questions answered? 75 minutes.</p> <p>IV. Travel to the college together for the meeting with the Office for Students with Disabilities.</p>
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## MODULE 4

### Supported Education

#### 4.1 Mainstream Education and Training

IPS programs help people with education goals that relate to their careers. They assist with mainstream education including high schools, community colleges, vocational training for adults (for example, culinary institutes, dog grooming schools, construction training), and four-year colleges. These education programs are available to anyone who meets the academic requirements for each program; they are not programs that are set aside for people who have disabilities.

#### 4.2 Integrated Education and Employment Services

Adequate research about supported education was unavailable at the time this manual was developed. One unanswered question is who should provide education supports. Some people think that IPS specialists who help with employment should also help with education. This is based on IPS research trials that demonstrated that when clients were asked to transfer from one practitioner to another for different employment supports, they frequently dropped out of IPS services. Others believe that new positions should be created for supported education specialists. What is most important is that education and employment supports are provided by specialists on the same IPS team. Some clients may change their goals between education and employment. And others will work and attend school or training at the same time. Offering both education and employment supports from one team will lead to better service delivery.

#### 4.3 Common Education Supports

Educational supports include some general forms of assistance that apply regardless of the educational program and other education supports that are specific to the type of training or educational institution. The process of requesting accommodations for high school is different than the process in postsecondary education. But learning about good study skills and developing study plans are strategies that students in all levels of education benefit from using. We will describe common education supports in this section and address supports for specific types of education later in this module.

##### 4.3.1 Effective Study Skills

IPS specialists review good study habits with students and help them create their own plan for studying. School libraries often have material about good study skills including sessions on improving study habits. Students are encouraged to access these resources when they are available.

The primary way most students study is by reading and highlighting text. But the practice of reading and highlighting is a passive approach to learning and is less effective than active learning. Examples of active learning are listed below. IPS specialists describe different approaches to studying, help students gather supplies they need, and may even help them prepare flashcards or other study materials. But IPS specialists do not tutor students themselves—instead they help students learn about available tutoring services.

## Examples of Active Learning

- Use practice tests. The student answers questions at the end of a chapter or uses homemade flashcards to test herself.
- Switch subjects. When students find their minds wandering, they switch to studying for a different class.
- Take breaks. When students find it difficult to concentrate, they take a 15-minute break, and then review what they had been studying before moving forward again.
- Ask questions. While reading chapters or notes, the student asks himself, “Why does that make sense?” “Why is this true?” “Why did this historical figure do that?”
- Lecture. The student stops studying periodically to give a lecture to imaginary students on what she has just learned.

### 4.3.2 Organized Study

IPS specialists help students organize their study time. Some students underestimate how much study is required for good grades. For example, some instructors recommend that students should plan to study at least one hour per week for each credit hour assigned to each course in which they are enrolled. The amount of studying depends on the course, however, as well as the level of academic preparation. Mathematics and science courses may require more study time. IPS specialists help students plan when they will study each week and they talk to students about whether they are able to stick to their plans. They suggest that students spread out studying rather than trying to learn everything at once (cramming for exams).

A typical education support is for IPS specialists to ask students to share their class syllabi so they can help the students block out time to study for exams and prepare projects well in advance. IPS specialists also add exams and projects to their own calendars so they can remind students to study and ask about grades.

IPS specialists help students think about where they can study so that they will not be distracted. They encourage students to turn off their cell phones and avoid listening to music while studying. When students live with family members, IPS specialists may also meet with the student and his family members so that they can support the student’s study plan.

Other examples of ways that IPS Specialists help students organize their studying include the following:

- Set goals. The student thinks of a specific goal for the study session, such as “I will learn ten vocabulary words.” “I will be able to describe photosynthesis.”
- Begin with small goals. Students work on shorter assignments first to experience a sense of accomplishment.
- Review notes. Students read their notes between classes, so they can incorporate what was covered and prepare to learn new concepts. This is especially important for sequential subjects such as math in which one concept builds on the next

### **Trent's Study Plan**

Trent was a student who had trouble with concentration. Reading a chapter of a textbook was so overwhelming that he often did not get past the first few pages. His IPS specialist helped him come up with a plan to read for 15 minutes while taking a few notes on what he had read. Next, he used his notes to “lecture” imaginary students on the reading material. Then he took a ten-minute break before he reviewed his notes and resumed reading for another 15 minutes.

## **4.4 High School Education Supports**

In most occupations, a high school diploma is necessary for gaining an entry-level job and starting down a career path. Although there are exceptions, it is very good advice that young people graduate from high school, and IPS specialists should help young adults weigh the pros and cons of dropping out versus completing their high school education. In terms of lifetime earnings, the mean earnings for high school graduates far exceed that of those who do not finish.

IPS specialists often begin working with high school students who are as young as 16 years old. They provide supports to help students graduate from high school. Specialists also meet with students and family members to plan for education, training, or employment after graduation. And IPS specialists help students with summer and weekend jobs while they are in high school.

### **4.4.1 Individualized Education Plans (IEPs)**

Individualized Education Plans (IEPs) are related to the Individuals with Disabilities Education Act, sometimes referred to as IDEA. The purpose of the IEP is to help students access the general curriculum in the least restrictive environment with their same age peers. To be eligible for an IEP, students must have 1 of 13 disabilities listed in IDEA, and the disability must affect the child’s educational performance or ability to learn. Students who may qualify are evaluated by their school for eligibility. In some situations, family members advocate for the student to have an IEP plan. If that is unsuccessful, they can ask for a 504 plan (See Section 5.4.3) so that the student can have some accommodations for learning.

Special education teachers, parents (when students are younger than 18 years), students and others develop IEPs together. Ongoing IEP meetings are to discuss the student’s strengths and needs, as well as possible accommodations and other related services to help the student succeed in school. An example of an accommodation is that a student who has difficulty writing answers to questions may be able to answer test questions orally. Or a student who has trouble ignoring distractions may be allowed to take her test in a quiet room. A simple accommodation is that a teacher reviews assignment instructions with the student and asks him to repeat back the instructions. Supplemental aids such as assistive technology are used. For example, electronic worksheets help students with dyslexia. Nonetheless, students who have disabilities are still expected to learn the same content as their nondisabled peers. The IEP is revised at least once each year, but IEP meetings may be held more frequently to review the student’s progress.

Parents have the right to invite people who have special knowledge or expertise about the student, for example, an IPS specialist, a mental health practitioner, or a state vocational rehabilitation counselor. Parents should notify school personnel in advance about the person(s) they would like to invite to the meeting. Students can also ask to include someone to help with career and education goals, but if the student is not the age of majority, his parents must agree to the request.

IPS specialists attend IEP meetings with students to point out the student’s accomplishments, support efforts to help students study, and discuss plans for part-time or summer jobs. An example of how an IPS specialist may support the education goal is to ask the special education teacher how a student learns best and then work with the student to develop a study plan (see above).

#### **4.4.2 Transition Plans**

Transition planning is the second part of the IEP process for students in special education. The purpose is to help the student set goals for employment, education, and independent living after high school. IPS specialists attend transition meetings to provide information about what IPS services will be available after high school, whether there will be a waiting list for services, and to learn about the student’s employment or education goals.

IPS specialists also help with career exploration such as arranging visits to different workplaces or meeting with academic advisors (see Module 3). Many young people benefit from making a plan for further education or vocational training before they leave high school. Visiting programs and imagining themselves as a student in those settings increases the likelihood that they will pursue more education after high school graduation. When a young person selects a program, the IPS specialist helps her apply for financial aid in a timely fashion, based on the application deadlines established by the academic institution. In most cases, young adults applying for a new educational program (such as community college) need to apply for financial aid before graduation from high school (see 4.5.2).

#### **4.4.3 504 Plans**

504 plans are related to Section 504 of the Rehabilitation Act of 1973. There are two requirements to get a 504 plan: 1) the student must have a disability—eligible disabilities include a broad range of learning and attention problems, and 2), the disability must interfere with the student’s ability to learn in a general classroom. Some youth who do not qualify for an IEP may qualify for a 504 plan. And students who feel that special education services are stigmatizing may prefer a 504 plan rather than an IEP. The rules about who is involved in a 504 plan are less specific than for an IEP but may include special education teachers, parents, and the school principal. Unlike an IEP, the plan does not need to be written but should include accommodations and services for the student, as well as who will provide each service.

#### **4.4.4 Alternative High Schools**

Alternative high schools are public institutions that are made available by local school districts for students who are at risk of not graduating due to poor grades, disruptive behavior, truancy, special needs, or other factors. And some alternative schools help high school students catch up on missed credits. Students may attend alternative schools until they graduate or until they are able to return to mainstream schools. Alternative schools have low student-to-teacher ratios and may teach adult life skills and/or vocational trades, as well as academic subjects. Some school districts may have more than one alternative high school, while others have none.

#### **4.4.5 Part-time and Summer Jobs**

Just like adults, youth learn about their job preferences by working in competitive employment, rather than by taking vocational tests, volunteering, or using short-term job tryouts. IPS specialists assist high school students with jobs when that is their preference. They help students consider work schedules that will not compete with their academic work, such as weekend or summer jobs.

### **Carl's New IPS Plan**

Carl was 17 years old and received treatment from a program that served youth experiencing psychosis. Carl was struggling a bit in his high school classes because he had trouble with concentration. His care manager suggested that an IPS specialist, Alejandro, could provide some supports for school. A few days later, Alejandro went to Carl's home to meet with him and his parents. Alejandro described the services that he provides to help people with work and school and asked about Carl's goals. Carl's parents explained that they collaborated with special education teachers at Carl's high school and that Carl had an IEP plan to help him graduate. Carl said that classes and studying bored him, but that he wanted to graduate. He also said that he loved cars and showed Alejandro the posters of high-end cars hanging in his bedroom.

If you were Carl's IPS specialist what next steps would you offer? There is no single correct answer, but some possible strategies are listed below:

- Ask Carl and his parents to join an IEP meeting so you can learn how to support his goal to graduate from high school.
- Spend more time talking to Carl about his interest in cars. Discuss jobs that are related to cars, and also learn about Carl's other interests. Begin filling in the career profile between appointments.
- Ask mental health treatment team members what they know about Carl's interests, academic progress, and past work experiences (if any).

With Carl's permission, make plans to meet with him and his parents again in a month to talk more about his plans for school and employment. Discuss ideas for a study plan that will help Carl graduate.

## **4.4.6 General Education Development (GED)**

Students who do not earn high school diplomas may opt to earn an equivalent certificate by passing four GED tests: language arts, math, science, and social studies. Free classes to prepare for the tests are offered at many career centers and libraries. In some states, online curricula are available for people who want to study independently.

Students begin by taking a test to determine what they need to study. Next, they attend classes that are loosely structured. Students choose how many days they will attend classes, but they are more likely to earn GEDs if they attend at least three days each week. Instructors present material for a portion of each day and the rest of the time students work independently with an instructor available in the classroom to answer questions.

When students struggle in a study area, IPS specialists help them ask GED instructors for extra assignments or they ask which free online sites have good GED study materials. Another example of an accommodation is that many classes require students to leave their books in the classroom, but in one case, an IPS specialist helped a student arrange to take a book home at night.

### **4.4.6.1 Postsecondary Education Supports**

In addition to supports for academic degrees, IPS specialists help with a wide range of certificate training programs. Many people who have problems learning prefer shorter programs that include hands-on learning, so IPS specialists should visit different types of training institutions, as well as the certificate programs at community colleges.

### **4.4.6.2 Program Selection**

IPS stresses the importance of preferences for employment, and this is also true for education with the caveat that students should consider their academic aptitudes when choosing an education program. If a

job does not work out, the worker can consider what was learned and move on to a new position. But if a student receives poor grades, that may affect his financial aid as well as his ability to continue attending school. IPS specialists help students consider past academic performance and they can also arrange visits with school advisors to talk about different programs and what have been challenges for students in those programs. Family members share information about a student's abilities and how he learns best.

IPS specialists also help students understand what different jobs are like before they invest time and money in education. They help arrange workplace tours and informational interviews (see Module 3). And they visit the school with the prospective student to talk with advisors and tour training areas.

In recent years, for-profit educational programs, including many offering online courses, have proliferated. The quality of the training and instruction offered by some of these programs are substandard, with students not getting good value for their investment of time and money. One important role for IPS specialist is to help evaluate the quality of educational programs and to advise clients to steer clear of predatory educational programs. To learn if a school is a for-profit institution, look it up using the National Center for Education Statistics "College Navigator" tool. That also provides information about the school's retention rates, accreditation, financial aid and student-loan default rates.

#### **4.4.7 Finances for Education**

In the United States, colleges require applicants seeking financial support to complete a Free Application for Federal Student Aid (FAFSA). FAFSA covers federal grants, including Pell grants, loans, and eligibility for work-study programs. People who complete the FAFSA automatically apply for other sources of aid, including state aid, financial aid from the college, state funds set aside for children who were adopted (not available everywhere), and scholarships. Students do not need to accept all the aid for which they qualify. For example, a student can choose not to accept loans or may accept a lower loan amount than offered. The FAFSA must be completed each year and should only be completed at the free government website, FAFSA.gov. After the FAFSA is completed, the student will receive a Student Aid Report (SAR) by email. The SAR will identify aid for which the student is eligible and what she must pay herself. The college(s) the student identifies on the application will automatically receive information about the student's financial situation and will assemble an award package that includes federal aid and other sources of aid for which the student is eligible. All awarded financial aid comes to the student through the college financial aid office. After the student receives the SAR, she should direct her questions to the financial aid office.

IPS specialists can learn about FAFSA by watching webinars on the FAFSA site. College financial aid officers may provide information to help IPS specialists understand more about financial aid. IPS specialists should be sure to learn the difference between subsidized and unsubsidized loans.

Federal aid is not available for all programs. State vocational rehabilitation counselors are sometimes able to help pay for education, but this is on a case-by-case basis and is related to a person's employment plan. Students who receive means-tested benefits (such as Social Security Income) are able to save money in set-aside accounts because of Achieving a Better Life Experience (ABLE) legislation. Benefits planners can share more information about ABLE accounts. Finally, students may receive free or reduced tuition if they are employed by the college. Tuition benefits for college employees vary by institution.

## 4.4.8 Accommodations for Learning

Offices for students with disabilities are available at all secondary educational institutions in the United States, although the name of the office varies by institution. Eligible students can request accommodations to help them succeed in school. Rules vary about whether students must register with the office prior to the semester, or if they can register when they determine that they need help during the semester. Enrolling early, well before the student encounters any difficulties, can help the student build a relationship with his assigned counselor. Also, it may take time to find and submit documentation of a disability so the student can be made eligible for disabled student services.

To be eligible for accommodations, students must have documentation of a disability that substantially limits a major life activity. Documentation can include a psychiatric evaluation, reports from other doctors, information about accommodations from high school, a copy of the person's transition plan from high school, and a high school transcript. Each accommodation is evaluated and granted individually. Accommodations requested should relate to a functional impairment, for example, a person who has trouble concentrating might ask for help taking notes during class. Whether an accommodation is provided may depend on what resources the school has available, for example, whether there is staff available to proctor exams in a quiet room.

When a request for an accommodation is approved, the student will receive a letter explaining what accommodation should be made. The student is responsible for sharing the letter with his instructor. The letter will not include information about the person's diagnosis or specific disability. The instructor should not ask about the person's diagnosis or specific disability, and if the student becomes uncomfortable answering questions, she can refer the instructor to her disability support services counselor.

### Hannah's Accommodation

Hannah registered with the Office for Students with Disabilities at her community college. She requested that she be allowed to take tests separately from the rest of the class (in a quiet room) and that she be given extra time to take the test. Her request was approved and she was given a letter to share with her instructor. Hannah became nervous about giving the letter to her instructor because she did not want to share information about her mental health with anyone outside of the Office for Students with Disabilities. She was unsure whether she would use the letter at all.

If you were Hannah's IPS specialist what next steps would you offer? There is no single correct answer, but some possible strategies are listed below:

- Review the letter with Hannah and point out that it does not include any information about mental health.
- Practice with Hannah what she will say when she gives her instructor the letter. Help her prepare a response if the instructor asks questions about a disability, for example, "I feel nervous when I take tests, but I have found that if I am in a quiet room and have a little extra time, I do much better." If the instructor asks more questions, Hannah can prepare to say something like, "I don't want to discuss my disability because I don't believe that it is related to my involvement in your class, other than the special test-taking arrangements in this letter. I am excited to learn about sociology and I expect to have a great experience in your class."
- Help Hannah plan when she will give her letter to the instructor. Some students find that when they give the letter to the instructor right after class, that other students are nearby and the instructor is distracted. A different option is to go to the instructor's office during scheduled office hours.
- If Hannah is unable to follow through with plans to take the letter to her instructor, offer to go with her. Plan in advance with Hannah about how to explain your role in Hannah's education.

#### 4.4.9 Steps to Begin an Education Program

After a student has applied for school and secured financing for an educational program, the next steps are to complete placement tests (for many institutions including community colleges), register for classes, and buy school supplies.

Most community colleges require students to take placement tests to determine the level of classes they will take. Financial aid rarely covers remedial courses, so it is advantageous for students to do well on the tests. Some colleges offer help with test preparation. College libraries may have materials to help people study for placement tests, and the college website may have information about how to prepare for the tests.

When students are ready to register for class, IPS specialists encourage them to start slowly. New students may want to take a full load of classes, but most people overestimate how many courses they can manage. Realistic planning includes starting slowly with a lot of education supports to ensure small successes early on. Otherwise, students may feel overwhelmed and stop attending classes or drop out. During the first semester or quarter, a person could take just one class that he thinks he will enjoy. IPS specialists help students consider a second semester course load that is balanced. For example, a student may take one math course that he expects will be challenging and a second course that he hopes will be easier. Family members who are excited about education goals may not realize the importance of taking small course loads to build confidence. IPS specialists meet with students and family members to encourage starting slowly and building on success.

Students need to be aware of the “Drop/Add” period and the deadlines after which financial penalties apply for withdrawing (as well as a later deadline after which a withdrawal becomes an automatic failure on the academic record). In most colleges, students can enroll in a course and drop it within a brief period of time without penalty. This option is especially useful for students who may optimistically sign up for more courses than they realistically can handle. The early withdrawal (often within just a few days after initial enrollment) can be an attractive option.

##### Ruben’s Checklist

Ruben had been an IPS specialist for two years when he learned that he would begin offering supports for education, as well. He wanted to be sure to remember the different ways that he could help new students begin school, so he made a checklist (see below):

- Help the students register for classes. Encourage students to start slowly with one class or two classes they think will be easier. Review the student’s college internet portal together.
- Offer to go with the student to orientation or encourage him to attend orientation.
- Explore the campus together. Find the student’s classrooms and the library. Consider options for where to spend time between classes and where the student can eat lunch.
- Plan what the student will need to take to school each day. A computer? Notebook? Textbooks? Lunch? A special calculator or other supplies?
- Go to the bookstore together to purchase books.
- Learn how to take the bus/train to campus or find the best place to park a car.
- Obtain school identification.
- Discuss the Office for Students with Disabilities and ask whether the student is interested in registering for services. Offer to go to the first appointment with the student.

#### **4.4.10 Continuous Education Supports**

IPS specialists meet regularly with students to learn how school is going. Did the student get to each class on time? How does it feel to be in class? Does she have any concerns? Early in the quarter or semester, they also ask if she received a course syllabus and they make plans to review all course schedules and write a study plan. They help students enter dates for assignments and tests into a calendar and they also keep copies of student schedules so they can remind students when to begin studying for tests and assignments.

As needed, IPS specialists also keep track of dates to drop classes without repercussions. If a student is falling behind, they discuss the possible advantages or disadvantages of dropping the course.

With permission from the student, IPS specialists coordinate with counselors from the Office for Students with Disabilities, family members, and state vocational rehabilitation counselors. They plan meetings with the student included to ensure that services are coordinated and meet the student's needs.

Some students may need help from an IPS specialist for the entire time that they attend an education or training program, while others only need help for the first semester or two. When students are doing well in school and do not want to meet frequently with IPS specialists, mental health practitioners may provide education supports until the person graduates and is ready for help with employment.

# MODULE 5

## IPS for Young People

### Training Notes and Exercises

#### 5.0 Training Notes for IPS Supervisors and Trainers

Who to invite:	IPS specialists and IPS peer specialists (if applicable)
Length:	75 minutes
Material to share with participants one week in advance:	Module 5 (reading material)
Preparation:	Ask specialists to bring a copy of their caseload lists to the training. Copy vignette: Terry's Changing Goals
Equipment/supplies needed:	Flip chart and marker
Training Outline:	<p>I. Group lists different ways that they have engaged youth (facilitator uses a flip chart and marker to write down the different strategies). They discuss which types of engagement seem to work best. What helps young people feel positive about IPS? Then facilitator asks the group what other ways they can try to engage youth and writes these down as well. 20 minutes.</p> <p>II. Team members review their caseloads and count the number of youth for whom they have had family meetings with the young person present. Discussion questions:</p> <ul style="list-style-type: none"><li>▪ What percent of young people have been involved in family meetings for IPS? Should it be higher?</li><li>▪ What are the advantages of involving families?</li><li>▪ What prevents us from involving more family members?</li><li>▪ What is the best place(s) to have a family meeting?</li><li>▪ Would it help to include case managers/counselors in the meetings? Should the IPS supervisor help with some meetings? Which ones?</li><li>▪ How can we do a better job of explaining to young people the reasons that we would like to involve more family members?</li></ul> <p>Team members set a goal to meet with at least one more family (with a young person present) in the next month. Supervisor writes a reminder to begin asking about family meetings during the weekly vocational unit meetings. 25 minutes.</p> <p>III. Vignette. Team breaks up into pairs to read the vignette and answer questions. They re-group to discuss their ideas. (Possible ideas: Meeting with Terry and his mother to talk about good job matches, ask Terry if he would like to look into expunging his record, help Terry look for driving jobs, bring</p>

	<p>up GED classes again in the future). Facilitator asks team members to share situations in which a young person has changed his goal frequently. How did that feel? Facilitator shares that the goal for some young people may not be steady employment right away because they need to learn about different options. How can team members support each other when they feel frustrated about rapidly changing goals? 25 minutes.</p> <p>IV. Supervisor: Share agency policy about text messages. 5 minutes.</p>
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## Module 5 Terry's Career Goals

Terry is 19 years old and he lives at with his mother and younger sister. Terry dropped out of high school during his senior year. Initially, he thought was interested in getting his GED, but after finding a GED class near his home, he changed his mind and told his IPS specialist that he would like to find a retail job because he is interested in fashion. After speaking with some retail managers, Terry learned that a conviction related to theft would make it difficult to find a job in retail. Now he thinks that he would like a driving job. He does not have a car of his own; he wants to investigate businesses that let employees use cars owned by the businesses.

If you were Terry's IPS specialist, what would you do?

## MODULE 5

### IPS for Young People

#### 5.1 Introduction

Some IPS programs only serve young people, typically those between the ages of 16 years and 26 years. This may be because the IPS specialists are integrated with mental health teams that focus on people experiencing a first episode of psychosis, housing teams that help homeless youth, or case management teams that help young people transitioning from the foster care system. Other IPS specialists serve adults of all ages, including some young people.

IPS for youth follows the same practice principles that have been described throughout this workbook. But IPS specialists serving young people find that they emphasize some areas more than when they work with older adults. These areas include the following:

- Extra efforts at engagement
- Clarity about the role of the IPS specialist
- More involvement with families
- Flexibility about goals
- Career exploration, and
- Education

#### 5.2 Engagement

There are many reasons that young people miss appointments or drop out of IPS services. Some young people are busy with many different activities and find it difficult to make time for appointments. Others are not absolutely sure that they need help with a career. And people who have experienced homelessness or foster care may find it hard to trust new social service workers.

One way that IPS specialists stay connected with young people is to offer appointments at convenient times and locations. For a young person who is in school during the day, that may mean that the IPS specialist has to adjust her schedule so that she can be available on some evenings. IPS specialists are creative about where they meet youth. Since young people want to feel more independent, specialists strive to let young people make as many decisions as possible. One IPS specialist asks about meeting locations at the end of every appointment. As a result, she met one person on the bus while he commuted to his job, and another near her locker in her high school hallway.

More than older adults, young people want IPS specialists to be aware of their interests. IPS specialists may spend a little more time than usual asking about what music a young person likes or what movies he has seen recently. They attempt to make appointments enjoyable for youth while still focusing on career goals.

In focus groups, youth explained that they felt frustrated when IPS specialists came to appointments without a plan. They wanted to know that the specialist had a strategy to help them with work or school. For example, “I thought of another business that hires people to work with animals. Would you be interested in going to a day care for dogs to learn more about what workers do there?” And they

appreciated knowing that IPS specialists made efforts to help them between appointments. For example, “I visited the bakery in your neighborhood and spoke to the manager. She said that she would consider hiring someone to work just Saturday and Sunday mornings, as we discussed.”

Other strategies IPS specialists use to engage youth include the following:

- Ask each young person how he would like to be contacted—text messages, email, phone calls, or through family members.
- Build trust by continuing to reach out so that youth learn that you are still there for them.
- Follow through on all agreements.
- Send reminders on the day of appointments.

### 5.3 Role Clarity

Some young adults may feel confused about the role of the IPS specialist in their lives because the specialist may be close in age to the youth they serve and because specialists meet young people in the community. IPS specialists should consider how they can be clear about the relationship. One strategy is for IPS specialists to focus on professionalism. For example, they prepare for each appointment. The IPS specialist shares a plan at the start of each meeting, such as, “I thought we could look into tutors to help you with the admissions tests. We could go to the community college to do that. How does that sound to you?” The plan communicates that the appointment is related to the person’s career; it is not a social visit. IPS specialists also dress in a professional manner, for example, slacks and a dress shirt. In addition, IPS specialists keep the focus on the person served rather than speaking about their own working lives or personal interests. And they explain their agency’s policy for accepting calls on their cell phones during evenings and weekends. Finally, when IPS specialists worry that someone is confused about their role, they talk to their supervisor about the situation. IPS specialists make the best decisions about personal boundaries when they ask for feedback.

### 5.4 Family Involvement

As described earlier in this workbook, “family members” may refer to parents, foster parents, partners, spouses, siblings, good friends, AA sponsors, or others identified by the client. IPS specialists offer to invite a family member to an appointment with a young person to brainstorm possible ideas for good job matches. Family members share helpful information and provide supports to help with work and school. And IPS specialists recognize that family members will be involved in the person’s life long after he has left the program; they value how family members can help.

IPS specialists include family members or close friends in some appointments, with the young person’s permission. The purpose is two-fold—to inform family members about IPS and the role of work in recovery, and, when appropriate, to enlist family members as supports for the person’s career goals. Each family is different, so the IPS specialist assesses the best role for the family, as viewed especially through the young person’s perspective.

IPS specialists sometimes report that few people served want to include family members. One possible strategy is for a specialist to ask, “If you got a job tomorrow, who is the first person you would call?” “Whose opinions do you trust?” The IPS specialist can explain the purpose of the appointment (to talk about the person’s goals and possible careers that would match her interests). And she can ask if there are any topics the young person would not want to discuss since young adults sometimes worry that family meetings will focus on problems that will upset their family members.

During the family meeting, the IPS specialist shares how she helps people with work and school. If a family member expresses concern about the young person working, or going to school, the IPS specialist listens carefully and asks questions to fully understand the family member's point of view. She may be able to provide information to help relieve the family member's concern such as information about benefits (she can offer an appointment with a benefits specialist), or a description of the different types of supports she offers to students and working people. The specialist will also help the young person explain why a career is important to him. The specialist may also ask family members for their ideas about jobs and careers the young person may enjoy. And she would wrap up the meeting by asking when they would like to meet again.

When IPS specialists ask family members for help, they try to avoid putting extra stress on family members. If a young person has a history of poor work attendance, the IPS specialist will avoid asking family members to nag the person to go to work since she does not want the job to become a source of conflict within the family. But family members may be able to help in other ways such as providing back-up transportation if the working person has car trouble. And with permission from a young person, family members may agree to be points of contact if the IPS specialist needs to get in touch with the young person.

#### **April's Employment Goal**

April is 20 years old and she recently moved out of her parent's home into an apartment of her own. April receives Social Security Income (SSI) benefits, a small amount of SNAP (food stamps), and her rent is subsidized. Although April has just enough resources to meet her basic needs, she would like to pursue employment. April has never worked but she has many different ideas about jobs she thinks she may like. April misses many appointments with her IPS specialist, but when she does meet her specialist, she enthusiastically shares her latest plans for employment. April has also reported that her parents do not believe she should work because they are worried that she will jeopardize her benefits.

If you were April's IPS specialist how would you help her get started with a career? There is no single correct answer, but some possible strategies are listed below:

- Propose a meeting with April's parents to discuss her interest in employment. Invite April's counselor to attend the meeting in case you need help supporting April's goals.
- Offer to set up an appointment with a benefits counselor for April and her parents to attend together.
- Help April identify which jobs she would like to learn more about. Set up visits to workplaces and meetings with working people quickly so April does not lose interest in employment.
- Discuss good places and times for appointments with April. Offer to send text message reminders on the morning of each appointment day.

## **5.5 Flexibility Regarding Changing Goals**

Young people sometimes change their goals for work and school on a frequent basis. That can be seen as a strength because it indicates that a young person is willing to try new things. And it is age appropriate because young people have not had many experiences, so they are unsure what they may like to do. IPS specialists try to expose youth to different jobs related to their interests. They understand that is how young people will learn about careers. IPS specialists stay with the young person, wherever he is at in terms of goals. If a young person describes a new interest and her IPS specialist tries to convince her to stay with her old goal, the young person may not feel that the specialist is in her corner any longer. A better strategy for the IPS specialist is to express enthusiasm and offer to explore the new idea. The goal is to keep the young person engaged and help her learn about different types of employment.

## 5.6 Education

Education is developmentally appropriate for adolescents and young adults. Moreover, youth are often interested in school or vocational training. Educational attainment predicts employment rate among people with serious mental illnesses. Education is critical for obtaining jobs that pay living wages. And lifetime earnings are strongly associated with educational attainment in the general population. All young people should be encouraged to complete at least a high school degree.

IPS specialists who serve only youth frequently find that about half of the people they serve are interested in employment, and many pursue part-time employment while they are part-time students. And some youth alternate between going to school and working.

# MODULE 6

## Job Searches

### Training Notes and Exercises

#### 6.0 Training Notes for IPS Supervisors and Trainers

Who to invite:	IPS specialists and IPS peer specialists (if applicable)
Length:	Three hours
Material to share with participants one week in advance:	Module 6 (reading material) Gaining Employment booklet from the Library at <a href="http://www.IPSworks.org">www.IPSworks.org</a>
Preparation:	Copy: Introduction to Employers worksheet
Equipment/supplies needed:	Flip chart and marker
Training Outline:	<ol style="list-style-type: none"><li>I. Discussion: Following up on applications. Facilitators ask how team members currently help people follow up on job applications. Team reviews page 19 of Gaining Employment together. Discussion about how IPS specialists can help people follow up in person. How would the IPS specialist describe her role in the person’s life if they went into the business together? One strategy would be to say, “I am an employment specialist and I help people return to work.” The specialist could also stop back in a couple days to say, “I thought you may have more questions about how I help people with work. And I am curious to know about the type of people who tend to be successful workers at your business. I wondered if I could set up a time to spend 20 minutes with you to learn about your business?” Supervisor makes a note to begin asking about follow-up visits after applications are submitted.15 minutes.</li><li>II. Team discusses how they can introduce themselves to employers. Facilitator hands out Introduction to Employers worksheet and each person writes his own introduction. The group breaks into pairs. IPS specialists and supervisor practice giving their introduction to each other. 20 minutes.</li><li>III. Team reviews list of questions (from this Module) that can be asked during employer appointments. They add a few of their own ideas for good questions. Facilitator emphasizes that the purpose of the meeting is not to learn about job openings, but to learn about the employer’s business needs.15 minutes.</li></ol>

	<p>IV. Team breaks into pairs (and possibly one trio) and they go out together to introduce themselves to employers and make appointments to learn about businesses. They take notebooks with a few questions jotted down in case an employer wants to meet right away. They bring their appointment books and business cards. 90 minutes.</p> <p>V. The team gathers together again to discuss their contacts with employers. What went well? What would they try differently next time? They schedule a time to go out together as a team again in two weeks, and again in six weeks. 30 minutes.</p>
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## MODULE 6

### Job Searches

#### 6.1 Job Search Preparation

IPS specialists help job seekers make contact with employers within about a month, on average, of beginning IPS services. They do not spend multiple meetings preparing for the job search, but they do help job seekers prepare a résumé, cover letter, and a mock job application. As they begin the job search they discuss interview questions and other techniques for finding jobs.

##### 6.1.1 Information for Job Applications

Many job seekers benefit from keeping a mock job application with employment dates, addresses, and phone numbers for past employers. The mock application also includes contact information for references, and information about education histories.

When a job seeker is unsure of the dates that he worked previous jobs, the IPS specialist helps him make his best estimate so that they can begin the job search. At the same time, the IPS specialist helps him obtain his work history from Social Security Administration (some Social Security Administration workers may refer to this as a benefit planning query or BPQY).

IPS specialists encourage job seekers to select their references carefully. They may even offer to be a reference for some clients. As needed, they help job seekers call potential references to ask permission to share their name and contact information with employers.

##### 6.1.2 Résumés

Each job seeker needs a current résumé to submit with online applications. There are many examples of résumés and résumé templates online. A good résumé is brief and uses simple language so that employers can easily understand the job seeker's experience. Résumés should include volunteer jobs, interests related to the job sought, and experiences that demonstrate reliability. A person who wants to work in a childcare center should highlight his babysitting experience, even if it was unpaid work for family members. IPS specialists should always ask a colleague to proofread résumés to ensure they are free from errors, including typos, which detract from an application.

##### 6.1.3 Job Interview Preparation

IPS specialists help job seekers prepare for interviews by asking about their strengths. They inquire about examples that illustrate those strengths and help job seekers plan what they will say to employers, "I am reliable. I did not miss one day of work during the year that I worked for the library." "I'm a good team member. I always get along with my co-workers." The job seeker should write down her strengths and review them just before an interview. Some people take notes to job interviews and glance over them before they leave, "I forgot to mention that I am accurate. My cash drawer was always balanced at the end of the day."

A typical interview question is, “What are your weaknesses as a worker?” Help people identify areas that could be problems on a job and how they have managed those in the past. “I can feel overwhelmed when I am very busy. I’ve learned that it helps me to make a list of what needs to be done.” “In my first position, I discovered that I do not like working alone. I think this job would be a good match for me because I enjoy interacting with others.”

### **6.1.4 Social Media**

IPS specialists help job seekers review their social media accounts. They explain that some employers review social media accounts prior to making hiring decisions and they help job seekers remove public material that might disadvantage them should an employer view it. Specialists also help job seekers record phone messages that are concise and professional.

## **6.2 Job Applications**

Many job seekers benefit from help with online applications, especially applications that include personality tests. Job seekers are more likely to be offered interviews if they select answers that demonstrate honesty. It is also important for job seekers to answer in ways that show they are positive and trusting towards managers. Some applications are timed so IPS specialists encourage people to move through the application as quickly as possible. Applications may be considered invalid if the applicant frequently chooses the neutral or middle responses, for example, almost always choosing “sometimes” rather than “frequently” or “never.”

Many job applications include a section on schedule availability. Applicants who indicate they are available for any work shifts have an advantage over others although doing so may not be realistic for everyone. Job seekers should be as flexible as possible when indicating their availability.

Encourage job seekers to apply for a specific position rather than writing, “Will do anything.” Employers want to hire people who are excited about their jobs, not those whose only interest is earning a paycheck.

Every blank on the application should be completed. If there is a section that does not apply to the jobseeker, for example, military experience, he should enter “N/A.”

It is critical to follow up on all job applications. Employers receive a large number of applications for each job opening, so a person with an imperfect work history may not be considered unless she has contact with a manager. Job seekers go to businesses (with or without an IPS specialist) to ask to speak with a manager. They explain that they have submitted an application and they express enthusiasm for the business saying something like, “I wanted to let you know that I applied online to work here. I also wanted you to know that I love animals and I have done a lot of pet sitting for my neighbors. I am also very reliable.” Managers are often impressed by the extra effort of in-person visits and that will help the job seeker’s application stand out. If it is not possible to see a manager in person, the job seeker can call the manager.

## **6.3 Employer Relationships**

IPS specialists often develop relationships with employers so they can learn about their businesses and suggest candidates who may be a good match for jobs. To do this, they make multiple in-person visits. The repeat visits demonstrate that the IPS specialist is dependable and interested in a long-term relationship. Just as many people find jobs through networking, the IPS specialist develops a network of employers that she can share with her clients.

IPS specialists use a three-step process for starting relationships with employers:

1. The first step is for the specialist to go in person to introduce herself to an employer and ask for a short appointment to come back to learn about the business.
2. When she returns for the appointment, the IPS specialist will focus on learning about the business and the employer's opinions about the type of workers who are successful in his business.
3. If a business is a good match for a job seeker on her caseload, the specialist will return to tell the employer about the person's strengths. The IPS specialist will ask to set up a short meeting for the employer to meet the job seeker. If the business does not seem right for the job seeker the IPS specialist had in mind, she may continue to visit the employer to maintain the relationship until she meets a job seeker who is right for that business.

### 6.3.1 Introduction

The first step is to visit a business and ask to speak to a manager. IPS specialists introduce themselves and ask for an appointment to come back and learn about the business. Scheduling an appointment demonstrates that IPS specialists know that employers are busy and that they want to be respectful of their time. They visit in person because employers are more likely to agree to an appointment if the request is made in person. Another reason to schedule the appointment in person is that building relationships with employers is best done in person, just as building relationships with job seekers must be done face-to-face.

IPS specialists prepare how they will explain the reason for their visits. Their introductions include their full name, workplace, the purpose of the visit, and how they hope to be a resource to the employer. An example of an introduction is below:

#### **Jorge's Introduction**

Jorge visited a local gym because he knew a job seeker on his caseload loved to work out. He thought that person would enjoy working with others who had similar interests, and he hoped to find a gym that would give free memberships to their employees. He wanted to learn about different gyms to find a good match for the job seeker he knew. When he went to the first gym, he asked for the manager and said, "Hi, my name is Jorge Rodriguez and I am an employment counselor at Counseling Center right here in town. I help people return to work, but I am not looking for a job for anyone today. The reason for my visit is that I would like to learn more about Silver's Gym so that in the future, I can help you meet the type of candidates who have the personal qualities and skills that meet your business needs. Could we schedule a 20-minute appointment to get together next week?" The manager replied that he was not hiring.

If you were Jorge, how would you respond to the manager? There is no single correct answer, but some possible responses are listed below:

- "It is fine that you aren't hiring because I would really like to get to know you and learn about your business. It is possible that someday in the future, I can help you find good employees if I understand what personal qualities and skills are most important for your gym."
- "That's okay because I am not looking for job openings. I spend time getting to know job seekers, and I also learn about managers and their business needs. I want to be sure that if I do encourage someone to apply for a job here, that the person will be happy working here and that he will be an asset to your gym."

### 6.3.2 Appointments to Learn About Businesses

IPS specialists prepare for the employer appointments by looking up simple information about the business. They learn what goods or services are produced by the business and they may read additional information such as the company mission statement. Company websites may also include information about different positions and job requirements. Specialists read the job descriptions so that they will sound prepared when speaking with the manager.

Specialists consider what questions they will ask during the meeting. Many managers love talking about their businesses, but specialists may need to ask a few questions before the conversation flows. Early in the conversation, managers will wonder what the IPS specialist wants from them. Specialists prepare at least five questions that will help them understand how the business operates and what type of candidate the manager would like to meet. They avoid asking about job openings because if the business is not hiring, the manager may think that there is no point to the discussion.

#### Examples of Questions to Learn About a Business

- What goals do you have for your department/business?
- Why do you like working for (name of company)?
- I saw that part of your company’s mission statement is to earn customer loyalty by delivering high quality, enthusiastic services with excellent value. Can you give me an example of when an employee went out of her way to provide enthusiastic service?
- How has it been for you to find the right people to hire?
- What type of person tends to be successful in the (name of position)?
- What personal qualities do you look for when you are interviewing candidates?
- How can you tell if a candidate has the personal qualities you need in your workforce—what questions help you learn that information?
- What is a typical day like for a (name of position)?
- What do (name of position) enjoy most about their jobs? And what are typical challenges for people in those positions?
- You said that people should submit an online application. But you also need people who are self-starters with outgoing personalities. If you had a cousin who was a self-starter and outgoing, how would you advise him to apply for work here?

### 6.3.3 Appointment Follow Up

Some managers may seem unsure about working with an IPS program. When that happens, the IPS specialist should consider how to continue developing the relationship. One strategy is to return to offer the name and phone number for another manager who has hired IPS workers in the past, saying something like, “I thought you may be curious about what it would be like to work with me. Sue Struthers at Avid Building Supply has hired a job seeker from my program and she would be happy to speak with you.” Or the IPS specialist may return to ask a few more questions, ask to be introduced to another manager at the business, or ask to observe workers for a half hour to learn about a specific job. Persistence matters. An IPS specialist cannot continue to develop the relationship if she does not go back to the business in person.

When a manager appears interested in taking a next step, the IPS specialist will quickly contact her client to share what she learned about the business. If the job seeker is interested, she will help him submit an application. Then she will return to the business to say, “Hal, I thought about your need to find workers who are reliable and who use good common sense when solving problems. I think I do know someone like that. Can I tell you about her?” The IPS specialist will have the person’s résumé available in case the manager is not able to access the job application easily. After describing the person, the IPS specialist will ask if she can bring the job seeker by the business to meet the manager. Even if the business is not hiring, she will try to introduce the job seeker saying something like, “It’s okay if you are not hiring because you never know when you will have an unanticipated opening. And it would be great for the job seeker to practice a few interview questions with you. Would you be willing to schedule a short appointment so that I can introduce her to you?”

#### **Jennifer’s Problem**

Jennifer had a positive meeting with a manager of a playhouse and was excited to return to speak about a job seeker she knew. But soon after Jennifer described the person’s strengths related to the job, the manager asked, “Why does this person need your help getting a job?”

If you were Jennifer, how would you answer the manager’s question? There is no single correct answer, but one possible response is below:

- “As I mentioned in my first visit, I work for Family and Children’s Services. My agency provides counseling and other support services to people in our city. The job seekers I know have experienced a mental health problem, but they have received treatment and are ready and eager to work again. It is difficult to describe the people I work with because each person has different interests and experiences. For example, one person is working as an accounting clerk, another is washing dishes in a diner, and a third person is working with children in a daycare center. Each person is succeeding in his job because we made sure to find a job that was the right match for him.”

### **6.3.4 Ongoing Relationships**

IPS specialists stay in touch with managers and business owners even when they are not hiring. When a specialist gets to know a manager who seems interested in working with her, even if he does not anticipate hiring soon, the IPS specialist will stop back to say hello when she is in that neighborhood. The specialist may contact the employer every four to six weeks so the manager does not forget about her. She may occasionally ask him to help out by providing a mock interview for someone who is practicing interview skills, to provide career information for a person who is considering a career that is similar to the business, or to ask for an introduction to another manager in town. Eventually, the IPS specialist may decide to remove that business from her list if it appears unlikely that the employer will be able to hire one of her job seekers.

# MODULE 7

## Time Unlimited and Individualized Job Supports

### Training Notes and Exercises

#### 7.0 Training Notes for IPS Supervisors and Trainers

Who to invite:	IPS specialists and IPS peer specialists (if applicable)
Length:	75 minutes
Material to share with participants one week in advance:	Module 7 (reading material)
Preparation:	Copy the vignette: Ben's New Job
Equipment/supplies needed:	Flip chart and marker
Training Outline:	<ol style="list-style-type: none"><li>I. Discussion: What is the best time to begin talking about possible jobs supports? What are different places that we can provide job supports? How can we make supports more convenient for working people? Do we routinely discuss disclosure again after someone has begun working a job? 20 minutes.</li><li>II. Vignette: Group breaks into pairs to discuss Ben's New Job. After they complete the answers, the group reconvenes to discuss their solutions to help Ben. Possible solutions would be for the IPS specialist to ask employer for extra time to learn the job (accommodation), talk to family with Ben to learn if he has ever been in similar situation and what helped, talk to VR counselor to learn if they can authorize a job coach who knows about car maintenance (maybe someone who already works for dealership), ask mental health team if medications could be slowing Ben down and whether an adjustment is possible, IPS specialist could also ask to go to job site to watch other techs and compare how they do their jobs to how Ben does his job. 25 minutes.</li><li>III. Discussion: Facilitator asks group to list all of the different types of supports they have used to help people with jobs (list on flipchart). Then asks group what other supports they can use. Adds to flip chart list. 20 minutes.</li><li>IV. Discussion: What are some different ways that we can help people with career advancement? (Possible answers: Help asking for promotions, more training or education, seek different employers or different positions.) How do clients know that we can help with career advancement after they leave our program? How can we share that with people? 10 minutes.</li></ol>

## Module 7 Ben's New Job

Two weeks ago, Ben was hired as an Automotive Quick Lube Technician at a car dealership. He changes oil, changes air and fuel filters, and completes tire repairs and rotations. Ben is happy about the job because it is full time and he receives health insurance, paid vacation, holidays and sick time. He enjoys the job because he has always enjoyed working on cars.

Ben's supervisor has reported that Ben is too slow. If he does not increase his speed, the supervisor may let Ben go. Otherwise, Ben's performance is fine. He is on time for work every day and gets along well with everyone at work. He appears eager to learn how the business operates and the quality of his work is good.

Ben lives alone but he gathers with his parents and adult siblings for dinner once a week. Ben's family is excited about his job because they think that he has seemed more depressed over the past two years when he was not employed. They think he seems happier and more energetic now.

Ben also has a state vocational rehabilitation (VR) counselor who works with his IPS specialist. His VR counselor came up with the idea of a Quick Lube Tech job because she knew that Ben and his father worked on cars together while Ben was living with his parents.

What are some of Ben's strengths and resources?

If you were Ben's IPS specialist, what would you do next?

## MODULE 7

### Individualized Job Supports

#### 7.1 Job Support Plans

Job supports refer to the variety of ways that IPS specialists and mental health practitioners help people succeed in their jobs. IPS specialists plan job supports in advance rather than waiting to see what happens after a person begins working. They are proactive and thoughtful about a job support plan. They consider how other jobs have gone for the person. What went well? How did the worker get along with others? Did he learn the job easily? What did he like or dislike about previous jobs? They also consider his preferences for job supports, including whether he has disclosed his participation in an IPS program to his employer. And specialists speak with the mental health treatment team about any mental health or substance abuse issues that could impact the job. If that is the case, they ask the worker for her ideas about how to best manage those problems. IPS specialists also consider each person's strengths and how those relate to her new position.

##### Abel's Story

Abel was a young man who lived with his girlfriend. When Abel was offered a job as a swimming instructor at the local community center, he was excited that he would be able to use his life saving certification. He was sure that he would enjoy teaching swimming lessons because he was outgoing and enjoyed being with children. Abel's girlfriend was happy about his new opportunity because she knew that he felt better when he was employed. One drawback was that he would have to help out as a lifeguard some mornings starting at 7:00 AM. Even though mornings were difficult for him, he wanted to give the job a try. Abel shared a car with his girlfriend and was able to use the car to go to work. Abel's IPS specialist was happy for him, but also a little concerned because she knew that Abel had been fired from a job for tardiness.

Abel's strengths for this job were that he was eager to work, he was outgoing, and he enjoyed working with children. His girlfriend was a support to him. And he had resources—a car and a life-saving certificate.

If you were Abel's IPS specialist, what would you do? While there is no single answer that is correct, some possible solutions are below:

- Abel's IPS specialist could give Abel wake-up calls for the first week or two to help him get used to waking up early for work.
- His IPS specialist could ask if he would like to have a meeting with his girlfriend to discuss how she could support him. They may decide to start going to bed earlier in the evening or to set an extra alarm clock.
- Abel's IPS specialist could speak with Abel about his ideas for getting to work on time. What does he think would help?
- If Abel does begin having problems with tardiness, his IPS specialist could explore the issue of disclosure again. Would it help for her to talk to his boss and request a different work schedule? Or would Abel rather talk to his supervisor independently?

IPS specialists develop written support plans with working people. They include specific information about what they will do to help with the job and how often. A sample job support plan for Abel is below.

### Sample Job Support Plan

Goal: <u>Abel will be employed as a lifeguard and swimming instructor at Fairview Community Center for the next six months.</u>			
Objectives	Action Steps	Person(s) responsible	Date
Abel will be on time for work every day.	--During his first week of work, his IPS specialist will call him 90 minutes before his work shift begins.	Abel and Sharon Lane (IPS Specialist)	June 15, 2020
	--Abel will go to bed by 11:00 PM.	Abel	December 31, 2020
Abel will get feedback about his job performance.	--Abel and his IPS specialist will have brief meetings with his supervisor monthly for the first two months.	Abel and Sharon Lane	August 1, 2020
	--Abel will ask his supervisor for feedback after he has worked for three months.	Abel	December 31, 2020
Abel will have opportunities to discuss how he feels about his job.	--Abel and his IPS specialist will meet weekly at his home.	Abel and Sharon Lane	August 15, 2020
	--Abel and his IPS specialist will meet every other week at his home.	Abel and Sharon Lane	December 31, 2020
	--Abel and his IPS specialist will meet every other month with his state vocational rehabilitation (VR) counselor.	Abel, Sharon Lane, Harvey Orange (VR counselor)	September 30, 2020

## 7.2 Types of Job Supports

IPS job supports are individualized so working people on the IPS caseload receive different types of supports. In this section we review some common job supports.

### 7.2.1 Meetings to Discuss a Job

IPS specialists offer in-person job supports because some people are reluctant to bring up issues if they are not sure the problems are significant. Face-to-face meetings provide opportunities to talk about jobs in detail. Specialists ask specific questions instead of asking general questions such as, “How is the job going?”. Examples of questions that specialists may ask are listed below:

- Do you have any concerns about your job?
- Has your supervisor provided any feedback about your performance? If so, what?
- What do you like about your job?
- What do you dislike about your job?
- Have you been able to arrive on time each day?

- What do you think about your co-workers?
- Have you ever had to miss a day of work?
- What was your best day on the job?
- Have you ever thought about quitting your job?

Meetings to discuss jobs should be convenient for working people who feel busy. IPS specialists offer to meet working people at times and in places of their choosing. When a young person said that he did not need job supports, his IPS specialist offered to give him a ride to work once a week. Other working people may like meeting the IPS specialist at their homes or at a coffee shop.

### 7.2.2 Family Meetings

With permission from working people, IPS specialists schedule meetings with family members or other support people to discuss the job. They celebrate successes at work and identify any concerns from family members or the working person. Family members may be willing to provide some job supports, but IPS specialists do not ask them to contribute in a way that will cause conflict within the family. For example, the specialist would not ask family members to nag someone to go to work each day.

### 7.2.3 Employer Supports

With client permission, IPS specialists contact supervisors within the first two days of employment and as often as once a week for the first few weeks. Some supervisors appreciate very brief contacts, perhaps as short as a minute or two when a worker is doing well. As a worker adjusts to his job, the contacts become less frequent, but IPS specialists are careful to stay in touch until a worker has been employed for at least a few months with steady, good performance. Regular communication with supervisors can save jobs.

When an IPS specialist and supervisor have a relationship, it is common to facilitate brief meetings with the supervisor and worker together. This provides the specialist with opportunities to model asking for feedback and the meetings allow workers to hear directly from their supervisors.

#### Guidelines for Facilitating Meetings with Workers and Supervisors

1. Start the meeting off on the right note.  
Begin by asking for positive feedback. "What is Cathy doing well?" This will help the worker feel better about the meeting if she later hears that some areas need improvement. And it will remind the supervisor of Cathy's strengths.
2. Rather than asking a general question, such as "How is Cathy doing?" ask specific questions similar to the examples below:
  - How is Cathy's attendance?
  - Is Cathy on time for work?
  - How does Cathy interact with customers?
  - Is Cathy able to complete her duties at the right speed?
3. Ask the worker for her opinions.
  - How has it been for you learning the job?
  - Are there any areas in which you need help?

- What parts of the job do you enjoy?
  - Is there anything specific about the job that you would like to discuss today?
4. Plan to solve problems during the meeting:  
If there is a problem, suggest a plan for improvement. Include what you will do to help. Let the employer know when you will follow up. Be sure to follow through with each commitment and continue to follow up with both people until you are sure that the problem has been resolved.
5. Discuss the meeting with the worker:  
After the meeting, ask the worker for her opinions. Did she agree with her supervisor’s perspective? Does she feel okay about the plan? Did she feel that her opinions were heard?
- 

### 7.2.4 Accommodations

Accommodations are adjustments to job duties or a job environment that help people succeed at work. In many cases, accommodations are inexpensive and simple. An example of an accommodation is a person who wore earplugs while he worked so that he would not be distracted by other people. Another accommodation is allowing a fast food worker to concentrate on making food rather than learning every position in the restaurant. IPS specialists propose accommodations to employers using everyday language, “Bob really likes his job here, although he feels nervous about locking up at night. He told me that after he is home, he continues to worry that he did not close the store correctly. Would it be possible to avoid scheduling Bob on the closing shifts?” Most employers are willing to make changes that are not too disruptive to the workplace in order to keep good workers.

#### John’s Job

John has been bussing tables for three weeks at a family style restaurant. John’s supervisor is threatening to fire John because he has trouble paying attention to details. He reports that John is very respectful and has come to work every day, but that John is taking plates from customers before they have finished eating. And when the restaurant is busy, John seems nervous and sometimes bumps customers with his cart.

If you were John’s IPS specialist, what would you do? There is no single answer that is correct, but we have listed some ideas below:

- John’s IPS specialist could go to the workplace immediately to talk to John’s supervisor. She could point out John’s strengths and ask if it would be possible to reassign John to work in the kitchen (away from the customers). An adjustment in job duties is a type of accommodation.
- John’s specialist could suggest that she would come to work with John for a week to help him become more comfortable on the job. It is possible that as he felt less nervous, he would be able to pay closer attention to his surroundings. Coaching at the worksite is another type of accommodation.
- John’s IPS specialist could talk to John about how he feels when he is at work. She can ask why it has been hard to concentrate and what has helped in other similar situations in the past. She could also talk to his mental health practitioners, and possibly family members to ask for their insights.

### 7.2.5 Other Types of Job Supports

IPS specialists provide many jobs supports, but mental health practitioners also help out because IPS uses a team approach to help people with jobs. The lists below include examples of job supports that IPS specialists and mental health practitioners provide.

## Examples of IPS Specialist Job Supports

- Assistance reporting earned income to sources of entitlements such as Social Security Administration, human services, housing programs, etc. Some people may only need reminders, while others appreciate side-by-side assistance.
- Access to benefits planning as work hours and pay rates change.
- Transportation to work. The IPS specialist might provide rides (or take the train with the worker) until the person has a long-term solution for transportation.
- Travel training-teaching someone how to use public transportation to get to work.
- Morning phone calls to provide support and encouragement and/or to make sure the person is up and ready to go.
- Help asking for raises and promotions.
- Family meetings to talk about the job, including the person's achievements, how the family can support the job, and any concerns related to the job.
- Meetings to discuss how the person feels about the job.
- Help with a savings plan for something the person has always wanted but could not afford in the past.
- Assistance solving social problems, for instance, some people are not sure how to start a conversation with coworkers.
- Employer meetings to review the person's performance, solve problems, and provide extra feedback to the person. This includes help asking for accommodations.
- On-the-job coaching (help learning job duties). Many people who receive IPS services do not need side-by-side job training, but some people with cognitive deficits appreciate extra help learning the job.
- Assistance buying clothing for work, tools, or uniforms.
- Help recording a work schedule.
- Help to leave a job that is not satisfying to the person. Assistance finding a better job or developing a career plan.
- Assistance asking for time off due to increased symptoms. Reminders to adhere to the workplace policies for calling in, bringing in doctor's notes, etc.
- Help designing compensatory job supports. For example, if someone had trouble remembering job duties, the IPS specialist could show him how to use lists. If someone had difficulty completing tasks on time, an IPS specialist might observe him working to help him devise more efficient methods or might help him practice key tasks until he could complete them in a shorter time. Another example would be color-coding cleaning solutions for a person who does not read.

## Examples of Supports from Mental Health Practitioners

- Medication adjustments for medication side effects or symptoms.
- Celebrations related to accomplishments.
- Discussions about the job.
- Assistance practicing social situations that occur at work.
- Money management and budgeting
- Help with personal appearance which may include assistance buying grooming supplies or setting up a schedule to do laundry.

### 7.3 Time-Unlimited Job Supports

In IPS, job supports are provided as long as a working person wants and needs assistance to maintain a job. Most workers receive job supports for about a year after they start working. The support is typically more intensive in the beginning, tapering off over time, depending on how well the job is going. If the worker experiences difficulty, the IPS specialist increases the amount of support. After a client is comfortable on a job, mental health practitioners or other support people may be chosen to provide ongoing job supports, as needed and desired.

When jobs are new, IPS specialists offer intensive supports to help workers adjust to their new positions. An IPS specialist may even meet with a new worker more than once during his first week at a job so that he has opportunities to discuss his performance, colleagues at work, and how he is feeling about the job. The specialist will also offer to meet weekly during the first month, and many people will want to continue meeting weekly for a period of time. After a person feels comfortable at work and confident that he is doing his job well, the he and the specialist may discuss less frequent meetings. But if a few months pass without any meetings, the IPS specialist may wonder if he really still needs her services. She would talk to the worker, his state Vocational Rehabilitation counselor (if he has one), and the mental health team about whether he continues to need her help.

## APPENDIX A

### Sample Career Profile

#### IPS Supported Employment/Education Referral

##### Face Sheet

Date of referral:

Name:

Address:

Email:

Phone number/s:

Best way to reach:

Case manager/therapist:

State vocational rehabilitation counselor:

Referral sent to state vocational rehabilitation

Other healthcare/social service providers:

What is the person saying about work? Why does s/he want to work now? What type of job?

Is this person interested in gaining more education now to advance his/her career goals?

Please include some information about the person's illness (diagnosis, symptoms, etc.).  
How might the person's illness (and/or substance use) affect a job or return to school?

What are some of the person's strengths? (Experience, training, personality, supports, etc.)

What job (type of job, hours, etc.) do you think would be a good match?

---

Person making referral

Title

## Career Profile

This form is completed by the employment/education specialist during the first few weeks of meeting with someone. Sources of information include: the person, the mental health treatment team, the young person's treatment/service records, and with permission, family members and previous employers. The profile should be updated with each new job and education experience by attaching job start, job end, and education experience forms.

## Work Goal

What is your dream job? What kind of work have you always wanted to do?

What are your long-term career goals?

What type of job do you think you would like to have now?

What is it that appeals to you about that type of work?

What type of job(s) do you know that you would not want?

Do you know people who are working? What types of jobs? What do you think about those jobs?

Is there anything that worries you about going to work? Why do you want to work?

## Education

Are you interested in going to school or attending vocational training now to advance your work career?

### Education/Learning History

Did you complete high school?

No  Yes

If no, would you be interested in earning your GED/high school equivalency diploma?

No  Yes  N/A

Did you participate in vocational training classes in high school?

No  Yes

### Education (continued)

Have you ever completed an apprenticeship (i.e., plumbing, welding, electrician, etc.)?

No  Yes

If so, what year?

Did you complete any job related job-related training in the military?

No  Yes

Please describe the training, including years and any certificates earned.

Do you have copies of the degrees, licenses, certificates that you have earned?

No  Yes

Are you interested in earning a specific certificate, license, or degree for work?

No  Yes

If the individual is not interested in additional schooling or technical training now, skip the next set of questions and ask about work experience instead.

What type of job are you interested in obtaining?

Do you know of a specific training/education program you would like to pursue?

What is it about that field that interests you?

Do you know about the availability of those jobs in this area?

When would you like to start an educational or training program?

How long do you want to go to a school or training program? What is your timeframe for completing education or training?

Would you be interested in visiting some local programs (community college, four-year college, adult vocational training) to learn about different options for degrees and certificates?

## Education (continued)

Are there any other job training or educational opportunities that you would like to learn more about?

### School Experiences

Let's talk about some of your school experiences and how they were for you.

Comments

Being called on in class	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Social situations	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Taking tests	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Learning from lecture	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Learning by reading	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Learning hands on	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Concentration	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Memory	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem
Using computers	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem

Did you have an IEP (individual education plan) or 504 plan while you were in school? Did that include different strategies to help you learn? What were those?

Were you in any advanced classes? Which ones?

Has anyone ever told you that you had a learning disability? What do you know about that? What accommodations have helped you in the past?

What are your strengths related to being a student?

**Plans for School and Training**

What do you need in order to start school?

- |                                                               |                                                     |
|---------------------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Access to a computer                 | <input type="checkbox"/> Computer literacy          |
| <input type="checkbox"/> Quiet place to study                 | <input type="checkbox"/> Transit card               |
| <input type="checkbox"/> Financial aid                        | <input type="checkbox"/> Books/ supplies            |
| <input type="checkbox"/> Mental health support                | <input type="checkbox"/> Eldercare                  |
| <input type="checkbox"/> Help studying                        | <input type="checkbox"/> Help with transit route    |
| <input type="checkbox"/> Childcare                            | <input type="checkbox"/> Help navigating campus     |
| <input type="checkbox"/> More support from family/friends     | <input type="checkbox"/> Help with a study calendar |
| <input type="checkbox"/> Help talking to teachers/instructors |                                                     |
| <input type="checkbox"/> Other:                               |                                                     |

Comments:

What are your resources for paying for school tuition? For books? For other school costs?

Have you ever received financial aid for school? Have you ever had a grant? What type? Have you ever defaulted on a grant or student loan?

Do you need any type of classroom accommodations?

What other types of supports may help you succeed in school or training?

## Work Experience

### Most recent job

N/A – Person has no work experience

Job title:

Employer:

Job duties:

Start date:

End Date:

How many hours per week:

How did you find this job?

What did you like about job?

What did you dislike?

What was your supervisor like? Your coworkers?

What feedback did your supervisor give to you?

Reason for leaving job?

Other info about job:

### Next most recent job

N/A – Person has only had one job

Job title:

Employer:

Job duties:

Start date:

End Date:

How many hours per week:

How did you find this job?

What did you like about job?

What did you dislike?

What was your supervisor like? Your coworkers?

What feedback did your supervisor give to you?

Reason for leaving job?

Other info about job:

**Work Experience (continued)**

**Next most recent job**

N/A – Person has only had two jobs

Job title:

Employer:

Job duties:

Start date:

End Date:

How many hours per week:

How did you find this job?

What did you like about job?

What did you dislike?

What was your supervisor like? Your coworkers?

What feedback did your supervisor give to you?

Reason for leaving job?

Other info about job:

**Next most recent job**

N/A – Person has only had three jobs

Job title:

Employer:

Job duties:

Start date:

End Date:

How many hours per week:

How did you find this job?

What did you like about job?

What did you dislike?

What was your supervisor like? Your coworkers?

What feedback did your supervisor give to you?

Reason for leaving job?

Other info about job:

*Please include additional jobs.*

## Military Experience

Not applicable because person was not in the military

Branch:

Dates:

Training or work experience:

Certificate or license:

## Cultural Background

Use the following script to introduce the next set of questions to the person.

**“Our agency aims to work with people from different backgrounds and with diverse experiences. The next set of questions will help me understand your background and culture, which may help us in planning for jobs.”**

What is important to you in terms of your background and culture? (i.e., race, ethnicity, color, gender, economic status, etc.)

Which different languages do you speak? Which language do you prefer?

What special events or holidays do you celebrate? Are there family traditions that you still practice? How would you like your family involved as we move forward in the process of getting and keeping a job?

Is it important to you whether your work supervisor is male or female?

Have you ever felt discriminated against or treated unfairly when you were looking for work or on the job? Could you tell me about that?

## Mental Health

Has anyone ever told you that you have a mental illness? If so, what did they say?

How does your mental illness affect you?

What are the first signs that you may be experiencing a symptom flare-up?

How do you cope with your symptoms?

What medicines do you take and when do you take them?

How do medicines work for you?

## Physical Health

How is your physical health? Do you have any health problems?

Do you have any problems with the following:

Standing for long periods  No  Yes

Can you stand for more than an hour?  No  Yes

Sitting  No  Yes

How long can you sit?  No  Yes

Climbing stairs?

How many flights? How often?  No  Yes

Lifting

How much can you lift?  No  Yes

Endurance  No  Yes

How many hours could you work each day?  
Each week?

What is the best time of day for you?

## Cognitive Health and Making Decisions

Do you have problems with memory?

Concentrating?

Doing things fast (psychomotor speed)?

If so, what things have helped with these issues in the past?

## Getting Ready for a Job

Do you have the clothes you will need for a job? For interviews?

Do you have an alarm clock or way to wake up for work?

Do you have two forms of identification? Picture ID, social security card...?

How will you get to work?

## Interpersonal Skills

Would you like a job that involves working with the public?

Where do you live and with whom do you live?

Who do you spend time with? How often do you see or talk to them?

Who can help us think about jobs you would enjoy?

Appointment made with support person to discuss jobs.

If not, why?

Once you are employed, who would be a good person to support you?

Anyone else?

## Benefits

Do you receive any of the following benefits?

Social Security Income (SSI)

Social Security Disability Income (SSDI)

Housing Subsidy

Temporary Aid for Needy Families (TANF)

Retirement from previous job

Food Stamps

Spouse or dependent child receives benefits

Medicaid

Veteran's benefits ( combat related)

Medicare

Unsure which benefits s/he receives

No benefits

Other benefits:

Do you manage your own money?

No

Yes

Referral made to benefits planner.

If no referral for benefits planning, why not:

## Disclosure (or use "Plan for Approaching Employers" Worksheet)

Please explain that each person using supported employment services can decide whether or not their specialist will contact employers on their behalf.

What could be some of the advantages of having an employment specialist contact employers on your behalf?

What could be some of the disadvantages?

Are there any things that you would **not** want your employment specialist to share with an employer?

Do you know whether you would like your specialist to go ahead and contact employers on your behalf? (It is okay to change your mind at any time):

If you decided that the specialist should not contact employers, what things would you like him or her to do to help you find a job?

- |                                                                         |                                                        |
|-------------------------------------------------------------------------|--------------------------------------------------------|
| <input type="checkbox"/> Help with job leads                            | <input type="checkbox"/> Help filling out applications |
| <input type="checkbox"/> Help writing a résumé                          | <input type="checkbox"/> Rides to job interviews       |
| <input type="checkbox"/> Practicing job interview questions and answers |                                                        |
| <input type="checkbox"/> Help following up on applications              |                                                        |
| <input type="checkbox"/> Other:                                         |                                                        |

## Substance Use

How much alcohol do you drink?

How often?

Is there a particular time of day?

What drugs do you, or have you, used?

How often?

## Legal History

Have you ever been arrested?

No

Yes

Have you ever been convicted of a crime?

No

Yes

---

Conviction 1:

Year:

Sentence:

---

Conviction 2:

Year:

Sentence:

---

Conviction 3:

Year:

Sentence:

---

Conviction 4:

Year:

Sentence:

---

Conviction 5:

Year:

Sentence:

---

What problems, if any, were you having in your life at the time of the offenses?

Do you have any pending legal charges?  
If so, what charge?

Parole/probation officer name:

Parole/probation officer phone number:

Do you have a copy of your record?

No

Yes

Do you want to get a copy of it?

No

Yes

## Daily Activity

What is a typical day like for you from the time you get up until you go to bed?

Are there places in your neighborhood that you like to go to?

Do you belong to clubs, groups, a church, etc.?

What hobbies or interests do you have?

What are your typical sleep hours?

**Networking contacts (family, friends, previous employers, other)**

**Information for good job matches from family, previous employers or others**

\_\_\_\_\_  
Staff signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
IPS specialist signature

\_\_\_\_\_  
Date

---

## APPENDIX B

### Job Start Report

---

Worker:

IPS specialist:

Vocational rehabilitation counselor:

Date that worker will begin job:

Job title:

Name of business:

Address of business:

Supervisor's name:

Will IPS specialist have contact with the supervisor?

- Signed release of information
- Worker does not wish to disclose working with an IPS specialist at this time

Duties:

Rate of pay:

Benefits:

Work schedule and hours per week:

Union position:  Yes  No

---

IPS specialist signature

---

Date

## APPENDIX C

### Job End Report

---

Worker:

IPS specialist:

Vocational rehabilitation counselor:

Business name:

Business address:

Supervisor:

Last day of work:

Change in duties, supervision, or work schedule (since job start):

Reason(s) for job end:

Worker's perspective on job end:

What was learned about the person as a worker:

Preferences for next job:

---

IPS specialist signature

---

Date

## APPENDIX D

### Education/Training Report

---

*Attach to Career Profile at the start of each education or training program. Update when student/trainee leaves an education or training program.*

Client:

IPS specialist:

School or training program:

Degree or certificate sought:

Start Date:

Full or part-time student/trainee:

---

Date person exited the school/training program:

Degree/certificate obtained:

Reason (other than graduation) that person left the school/training program:

Supports provided by IPS specialist:

Supports provided by office for students with disabilities:

Obstacles encountered/how did person overcome obstacles?

Lessons learned for future education or job experiences:

---

IPS specialist signature

---

Date