

Plan Preparation Summary

Part III Guide

Participant's Name: _____ Facilitator: _____
Date: _____

Section 1: *Conditions* are characteristics of *any* job developed for the individual. Conditions refer to issues such as days of work, pay, benefits, location of the job, inside/outside work, time of day, hours per week, etc.

1. Conditions for Success

- a. **General conditions for participant:** *This section addresses the general conditions across life functioning areas that should be in place to assure success in the performance of tasks, comfort, communication and interactions. Be sure to address general conditions across an array of settings and do not focus specifically on employment. Employment issues may be addressed in a general manner but **avoid** conditions for task performance, instructional strategies, environmental conditions, supervisory strategies and supports.*
- b. **General conditions for family (or staff, as appropriate):** *This section addresses the conditions that the participant's family, as appropriate to the individual circumstance, feels need to be in place in order for employment to be successful. Only address those conditions that **differ** from those addressed in other areas or those that the family feels are **critical** to success and, therefore, would need to be included in the plan.*
- c. **Conditions for task performance:** *This section addresses the conditions that need to exist for maximal performance of tasks by the individual. Be sure to translate from observations in typical life to identify these conditions. Pay attention to factors such as standing/sitting, speed/pace of performance, and endurance. Comment on the role of personal interest in regard to task performance.*
- d. **Instructional strategies:** *This section addresses the types of instructional strategies that seem to work best for the individual. Focus on trainer interactional styles, use of written and visual instructional materials, particular cues that work well and group versus individual approaches. For students and those in adult human service settings, describe and discuss the strategies that were observed during discovery that seem to work well.*
- e. **Environmental conditions:** *This section addresses the environmental conditions that seem to work best for the individual. Pay close attention to temperature, lighting, noise, odors, color scheme and other similar factors. Address issues relating to decor and aesthetics that might be important to the individual as well as the degree of movement, "elbow room", and other unique factors. Address the presumed importance related to the types of workplaces such as industrial, commercial, office, professional, construction, etc.*

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- f. Supervisory strategies:** *This section addresses the supervisory strategies that seem to work best for the individual. Address factors such as whether the individual responds best to one or to multiple supervisors, the gender and relationship to the individual and the style of supervision offered. Observe the reaction of the individual to teachers, parents, adult service supervisors and other authority figures in the individual's life.*
- g. Supports needed for successful task performance:** *This section addresses the type and degree of supports typically needed for successful performance of tasks and for the individual's best response to expectations. Try to gauge the typical intensity and duration of supports from the perspective of acquisition of information and of stability of behaviors, as appropriate. Describe degree of supports needed for community tasks, work experiences or previous jobs.*
- h. Conditions to be avoided:** *This section addresses the array of conditions, across all of the areas listed above, that should be avoided in order to assure successful employment. Give an indication of the relative importance that any listed condition should/must be avoided. Be sure to focus on descriptions of the conditions to be avoided and do not address perceived weaknesses of the person.*

Section 2: *Interests* give direction toward a certain area of work market. Interests should be stated in the broadest possible manner, allowable by the applicant. Interests might include: working around boats, office work or working in a retail setting. *Avoid* using job titles. Give particular focus on activities that the individual performs without being expected to do so.

2. Interests toward an aspect of the job market

- a. General personal interests:** *This section addresses the individual's general life interests as indicated by intrinsic performance, repeated performance, deep personal information, relationships with others who share similar interests and other factors that imply personal interest in the activity. Be sure to focus beyond employment and include hobbies, solitary activities, organized sports and leisure activities, and similar activities that comprise a notable portion of the individual's unencumbered time.*
- b. General family interests (or staff, as appropriate):** *This section addresses the activities the individual's family participates in. Through observation and discussion determine if the individual participates in those activities and whether the person is encouraged/discouraged to participate. This area gives insight into why an individual might show interest in an activity and the role of encouragement in developing personal interests.*

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- c. **Activities participant engages in without being expected to do so:** *This section focuses specifically on all activities the individual performs without being expected to do so. Look beyond employment to the individual's residential and community life. Pay close attention to topics that are often repeated verbally or through performance by the individual. Try to translate life activities to potential work interests in this area.*
- d. **General areas of current work interest:** *This section addresses the general areas of work interest as indicated by the individual, family and supporters. Be particularly careful to avoid job titles and make sure that any interest areas described are consistent with the other areas of this section. Try initially to use a broad, rather than specific, description of the person's interest. After stating the general interest, it is fine to be specific regarding narrower aspects of task performance. Example: "Joe is interested in working around boats. He is particularly interested in helping boaters launch their boats and to return boats to a trailer."*
- e. **Specific areas of past work experience:** *This section addresses any areas of past work performance that were of interest to the individual. Remember to avoid job titles in stating the individual's interest but it is fine to list job titles of previous jobs held by the person. Get beyond job titles by focusing on discrete tasks or aspects of jobs performed by the person that were of interest.*

Section 3: *Contributions* refer to the rationale used by employers as the basis for hiring job seekers. While this area does not address specific tasks to be offered, it does detail general benefits received by employers as offered by the individual. These contributions might include positive personality characteristics, discrete skills, credentials, work experiences and recommendations by former employers and others in positions of authority.

3. Contributions

- a. **Strongest positive personality characteristics:** *This area addresses the individual's strongest personality characteristics. Employers will expect these characteristics to be available, if targeted in the plan. Be sure that any characteristic listed be one that a reasonable employer would be able to identify. All personality characteristics listed should be described in relation to actual performance. It is better to have a few strong personality characteristics than many weak ones. Never ascribe a characteristic to an individual who does not possess that trait.*
- b. **Most reliable strengths regarding performance:** *This area addresses the individual's most reliable strengths, as exemplified in performance of life activities and situations. Consider the best aspects of the person's behavior, demeanor, attitude and beliefs. These items are often subtle and different people may see the same feature in a different way. These aspects often can be viewed in the manner in which the person copes with difficult or stressful situations, emergencies and unforeseen circumstances.*
- c. **Best current and potential skills to offer to potential employers:** *This area addresses the best current or potential skills that could be offered to potential employers. For non-work*

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skills it will be necessary to translate the skill into potential work tasks using employer language. Section 5 of Part II of the Discovery Profile is the best source of information for this component. Include only those tasks/skills that the individual has interests in performing. Use complete sentences to describe the skill/task and avoid using a single word or phrase listing.

- d. Credential training, certifications and recognized skills:** *This area addresses any criterion training completed or participated in by the individual. Criterion training refers to training those results in performance of an expected quality or standard. Examples include high school diplomas, college degrees, vocational school certificates, etc.*
- e. Possible sources for recommendations:** *This area addresses the possible sources of recommendations by former employer or others in positions of authority. Consider former teachers, principals, executive directors of service organizations, and counselors, in addition to employers, supervisors and business owners. Generally, family, relatives and friends can only offer personal, not employment recommendations.*
- f. Resources/financial assets:** *This area addresses any employment related resources owned by the individual that may comprise “value-added” to a potential employer. Examples of resources might include work tools, specialty equipment and unique incentives such as eligibility for WOTC. Financial assets might include access to a personal budget to pay for job site supports or rehabilitation technology.*

Section 4: *Challenges refer to any complexity of the individual that is likely to make employment difficult or unlikely. These challenges may be related directly to the person’s disability or to their life circumstances.. Care should be taken to avoid labels, to state the challenge(s) in a descriptive manner and to identify potential solutions for each challenge indicated. It is also important to consider that some challenges may be of such embarrassment or concern to the individual that the issue(s) should be addressed in the Sensitive Information section at the end of Part III. Information discussed in this section is not to be included in the regular profile documents or distributed to others.*

4. Challenges

- a. Areas potentially needing matching to employment sites:** *This section addresses any issue that requires a careful matching of potential job sites to the needs of the individual. For example, for an individual who has difficulty dealing with large numbers of people, job sites with only a few employees and/or customers would need to be targeted.*

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- b. Areas potentially needing negotiation with local employers:** *This section addresses any issue of the employment relationship that is likely to require negotiation of existing conditions – beyond matching – that are necessary for successful employment. Almost all job seekers requiring customized employment as a strategy will need job tasks negotiated. An example for behavioral challenges might involve negotiating that an employer would not summarily fire an employee who curses whenever a mistake is made.*
- c. Physical/health restrictions:** *This area addresses any restrictions that need to be accommodated, matched or negotiated regarding the job seeker’s physical ability or health. Virtually all health restrictions should be verified by a medical doctor but may be suggested by the individual or family. Physical restrictions may be identified functionally by the individual, family or through observation or by a medical doctor. All legal restrictions such as “medical incapacity” must be determined by a medical doctor but efforts should be made to determine the specific areas of performance that are restricted.*
- d. Habits, routines, idiosyncrasies:** *This section addresses any relatively minor, but potentially annoying or confusing, aspects of the individual’s life. Care should be taken to describe the behavior. Any evaluative language should be attributed to others and must be respectful and optimistic. Identify possible solutions or interventions – past, current or proposed. Observe how others respond to the behavior, particularly in a positive manner. Avoid professional labels but it is fine to indicate that a doctor or psychologist has given a label to the behavior.*
- e. Challenges associated with disability/ need for accommodation & disclosure:** *This section addresses all the issues associated with the individual’s disability. Be sure to avoid disability labels but it is fine to describe the impact of disability on performance. For instance, instead of saying that Mary has a severe intellectual disability, she might be described as taking considerably longer to learn certain work tasks than others. Instead of saying that Briley has bi-polar disorder, he might be described as a person who needs to be hospitalized once or twice per year to deal with emotional issues. For many people who need customized employment to become employed, this is a section of significant importance and care should be taken to fully describe the issues associated with the individual’s disability. Behavioral issues related to disability should be addressed in this section. Address whether the issues described in this section need to be disclosed to potential employers and suggest possible descriptive that might be used with employers.*
- f. Financial issues:** *This section addresses issues/challenges related to the financial status/stability of the individual. Avoid a financial description or socio-economic ranking or the individual and focus instead on issues related to money and financial resources. For instance, it might be discovered that Henry does not currently have enough money to buy acceptable clothing for employment or that Beth is receiving letters from a loan company regarding the repayment of a loan to buy a television. It is appropriate to translate financial issues into conditions that relate to the amount of money and hours needed for employment. This section can also be used to describe issues, concerns and limitations regarding the individual’s public or private benefits.*

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- g. Transportation issues:** *This section addresses issues/challenges related to the individual's transportation availability. While transportation was described in Part I, Section II, of the Discovery Profile, this section discusses the specific limitations and realities of how the person might get to work. For example, it might be discovered that, "Even though there is no public transportation in his town, Jody has the stamina to walk for a distance of between 6 – 8 blocks from his apartment for a potential job." Another example for this section might indicate that, "The city bus only runs by Phyliss' group home twice in the morning and twice in the afternoon at 8:45; 10:45 2:45 and 4:45. Any employment for Phyliss would need to be negotiated around these times."*
- h. Promising solutions: Current, past or potential:** *This section addresses any solutions identified in relation to any of the challenges described in this section. If solutions were addressed in earlier components, it is not necessary to repeat them here. Be sure to describe any condition, positive intervention or situation that has promise to reduce or eliminate the challenge. Be sure to list strategies that were used successfully in the past as well as predictions of strategies that might be used in future job settings.*

Section 5: Once the preceding information has been fully developed and prior to the Planning Meeting, make a listing of between 15 – 25 employers that are consistent with the job seeker's conditions for success and their interests. This list will serve as a resource for the Specific Employers List developed in the Customized Planning Meeting.

5. Potential Employer List: *(create a listing, below)*

Sensitive Information (optional)

This additional information is for the facilitator only.

This section gathers information that is relevant to developing/negotiating a job, community experience, or other outcome for the participant and is information not covered in the profile. Additional information that could possibly be perceived as a barrier is described below to assist the developer in framing the issue to seek a workable perspective for the job developer. This information will not be shared with readers of the profile.

1. Describe any areas of concern relating to potential barriers to successfully negotiating an employment outcome.
2. Identify people within the participant's circle of professionals and friends who are aware of the areas of concern and specify their involvement.
3. Identify how the area(s) of concern impacts both developing and maintaining employment.
4. Describe current or past strategies implemented to minimize areas of concern or impact on employment.
5. Describe possible future strategies to minimize areas of concern or impact on outcome.
6. Describe any legal restrictions that may impede the hiring process, employment in certain types of business.