

Abilities at Work Presents:

Team Based Supported Employment 2nd Metrics Reporting

Prepared by:

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Introduction

The following is a metrics report for the Oregon Department of Human Services regarding the Innovative Employment Services grant that was awarded to Abilities at Work, July 2017. As in the 1st Metrics report, four important categories will be measured followed by a narrative explaining how “Team Based Supported Employment” has been moving forward. The following categories have been measured:

1. Number of Job Placements and Vocational Rehabilitation Case Closures
2. Client Participant Satisfaction with Team Based Supported Employment
3. Abilities at Work Employee Satisfaction with Team Based Supported Employment
4. Revenue and Cost Analysis of Team Based Supported Employment

This report will outline the 2nd period of the metrics reporting, 12/1/2017 - 4/30/2018. All the metrics and analyses are based within this period except for the employee surveys. The final report will follow up on this 2nd Metrics reporting.

Key Staff and Responsibilities

Crystal Luna, Project Manager - Responsible for managing the grant and for providing oversight for the Team Based Supported Employment (TBSE) team.

E01 - Employment Specialist on the TBSE team who was hired at the beginning of the 1st Metrics period

E02 - Senior Employment Specialist on the TBSE team who was promoted to Project Manager during the 2nd Metrics period

E03 - Employment Specialist on the TBSE team who left in 1st Metrics period

E05 - Employment Specialist on the TBSE team who was hired in the 1st Metrics period to replace E03 and left at the end of the 2nd Metrics period

E07 - Employment Specialist on the TBSE team who was hired in the 1st Metrics period and promoted to TBSE Team Lead during the 2nd Metrics period

E08 - Employment Specialist who is not on the TBSE team but does fill in for team members as needed

E09 - Employment Specialist on the TBSE team who replaced E05 at the end of the 2nd Metrics period

Glossary, Keywords, and Definitions

Job Placement: Client has been placed into a competitive integrated employment.

Unsuccessful Vocational Rehabilitation (VR) Closure: Client was unable to secure competitive employment and decided to either work with a different provider or decided to pursue a job that is not considered competitive integrated employment.

Successful Vocational Rehabilitation (VR) Closure: Client with the help of Abilities at Work staff secured competitive employment and has long term supports put into place.

Client: Individual who is receiving supported employment services.

Individualized Supported Employment (ISE): Client is receiving services that pertain to ODDS funded supports for initial job coaching, ongoing job coaching, or maintenance job coaching.

Long Term Supports: The services provided after a client has reached “Stabilization” and continues to need job coaching in some form to help maintain/advance in their current position. Typically funded by ISE dollars that are provided by ODDS.

Vocational Rehabilitation Funding: Funding that is provided from Vocational Rehabilitation specifically to help an individual client to secure competitive integrated employment.

2nd Metric Reporting: The defined period for this grant specifically within **12/1/2017** through **4/30/2018**.

Return on Investment (ROI): A performance measure used to evaluate the economic efficiency of an investment or to compare the economic efficiency of several different investments.

Formula Used: $ROI = (Revenue - Expense) / Expense$

ROI is expressed as the percentage of profit (revenue - expense) over total cost.

Example of how ROI is used: Joe invested \$1,000 in Diamonds and sold those said diamonds to Bob for \$1,200, Joe made a \$200 profit due to this transaction. To calculate his ROI, Joe would divide his profit by the expenses ($\$200 / \1000) and he would have a 20% ROI.

Break Even Point: The point at where the total cost and total revenue are equal.

Team Based Supported Employment (TBSE): A model developed by Justin Lee to create more sustainable employment services for individuals with developmental disabilities. Rather than having one individual provide employment related services to multiple individuals with developmental disabilities, Team Based Supported Employment utilizes a team of three individuals that shares a mutual caseload to provide employment related services. Please refer to the Grant Proposal to learn more about the inner workings of how TBSE works.

Traditional Caseload: This is a caseload of clients that is served only by one individual. Within this grant the traditional caseload is an employee who operates on their own with their own caseload. This individual will perform all the employment related services for their respective clients.

Black: A financial term denoting that revenues are more than the cost of expenses.

Red: A financial term denoting that revenues are less than the total cost of expenses.

1. Number of job placements and vocational rehabilitation case closures

Figure 1- Job Placements within 2nd Metric Reporting (12/1/2017-4/30/2018)

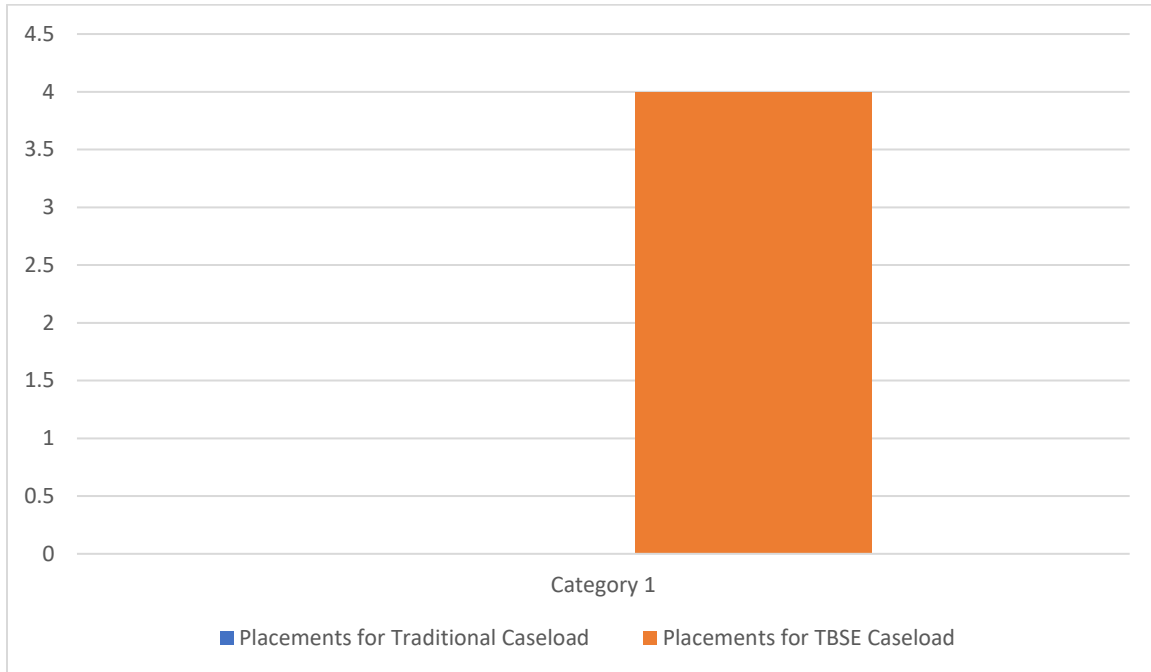
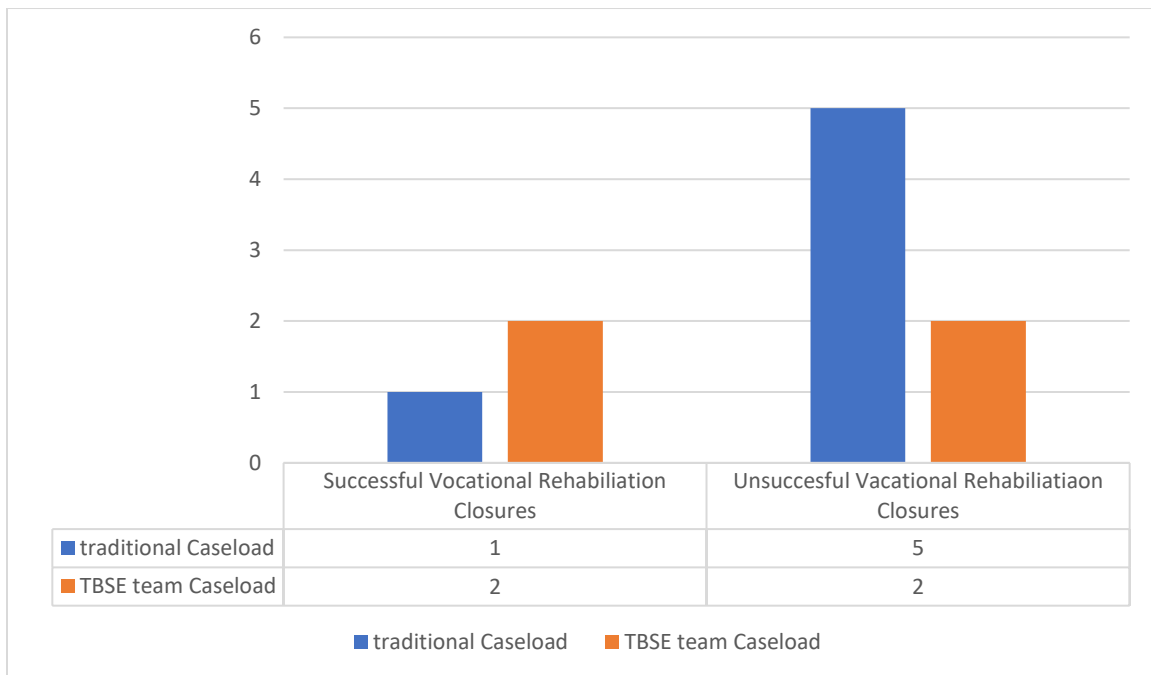


Figure 2 - Number of Successful/Unsuccessful Closures in VR within 2nd Metric Reporting (12/1/2017-4/30/2018)

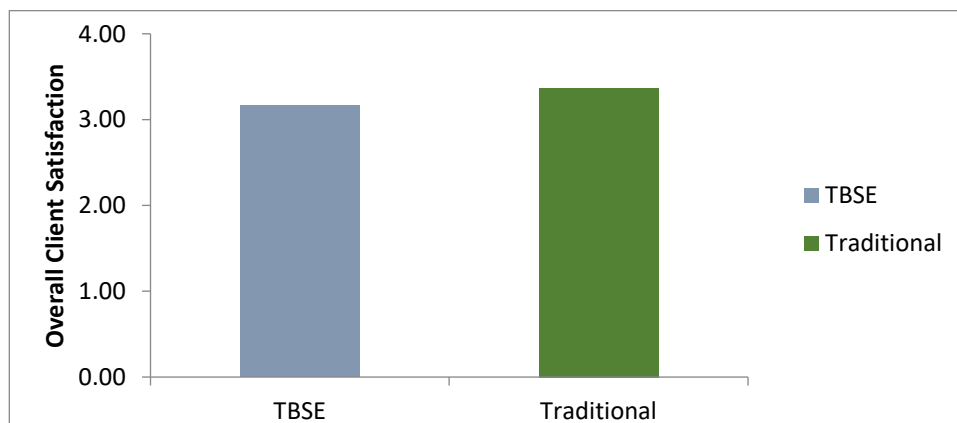


2. Participant satisfaction with team-based supported employment

In order to evaluate the impact of the TBSE model on the participant (client) satisfaction, we developed a 6-item questionnaire that aimed to measure overall satisfaction with services provided, willingness to recommend services, and value gained from the services (see Appendix for complete questionnaire). Participants rated each item on a 5-point Likert scale with questions ranging from "Very Dissatisfied" to "Satisfied," "Very Unlikely" to "Very Likely," and "Very Little" to "Very Much." Sixteen clients participated in completing the questionnaire (14 in TBSE model and 2 in Traditional model).

As shown in **Figure 3** below, overall satisfaction levels were high and differed only slightly between participants in the TBSE model (3.17) and those in the Traditional model (3.37). Although the small sample size in the Traditional group makes it difficult to draw strong statistical conclusions, it is notable that participants in the TBSE group were just as satisfied with their services as those in the Traditional group, with average responses indicating a level of satisfaction in-between "Satisfied" and "Very Satisfied."

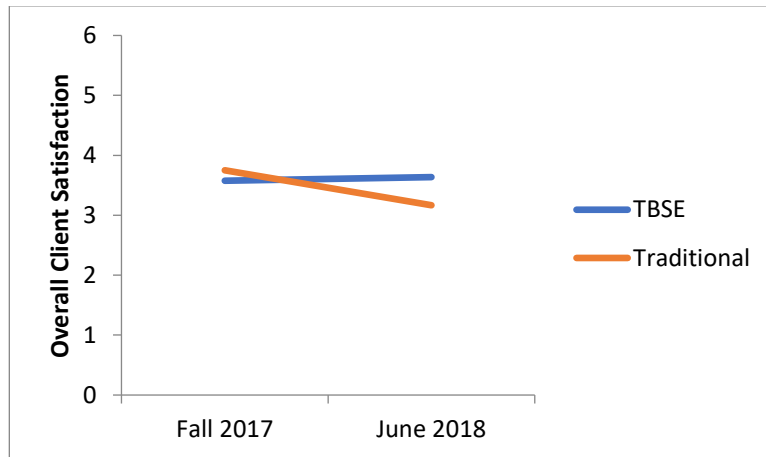
Figure 3 – Participant Satisfaction



In addition, for 13 of the clients (11 in TBSE and 2 in Traditional) who completed the survey in the Fall of 2017 as well as in June 2018, it was possible to examine trends in satisfaction with services over time. As shown in **Figure 4** below, satisfaction levels remained relatively stable across the two time points, and if anything, there was a slight increase in client satisfaction with services for those

in the TBSE group and a slight decrease in satisfaction for those in the Traditional model. These results, however, should be interpreted with caution given the small sample with only 2 participants in the Traditional group.

Figure 4 – Participant Satisfaction Across Time

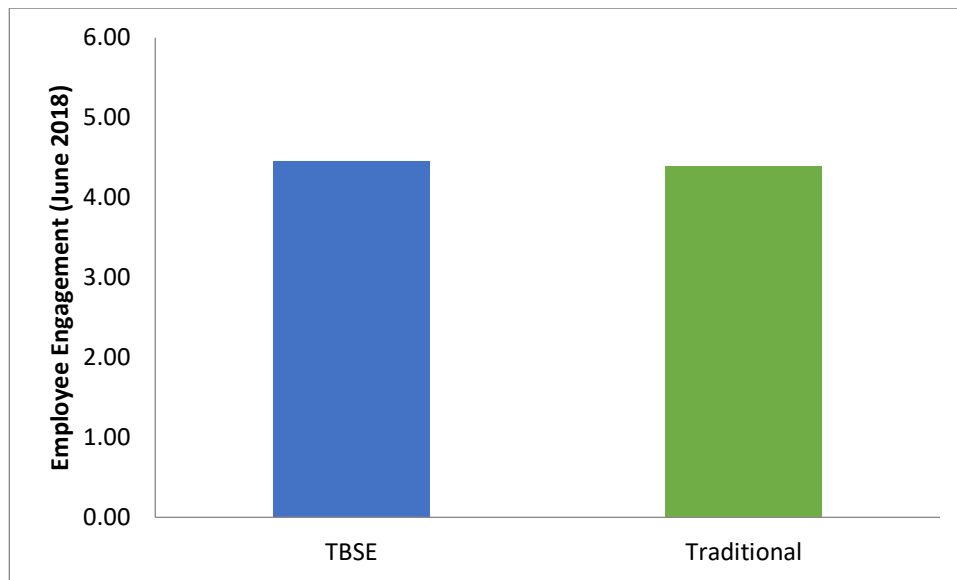


3. Provider employee satisfaction with team-based supported employment.

In order to evaluate the impact of the TBSE model on the employee engagement, we implemented a survey that was adapted from the The Utrecht Work Engagement Scale (UWES-9; Schaufeli, Bakker, & Salanova, 2016). Participants were instructed to rate how frequently they have experienced a range of positive and negative feelings about their work on a Likert scale from 0 (Never) to 6 (Always/Everyday). Of the 18 questions included in the survey, 9 described positive feelings (i.e., "At my work, I feel bursting with energy") and 9 described negative feelings (i.e., "At my work, I feel emotionally drained"). See Appendix for full set of survey items. For analysis, Responses to the 9 negative phrases were reverse-scored and averaged with responses to the positive phrases to create an overall measure of employee work engagement ranging from 0 to 6, with higher scores representing greater employee engagement.

Five Abilities at Work employees participated in completing the survey. Four of these participants worked in the TBSE model; two of which began working under the model in July 2017 and were included in an earlier survey as well, while the other two began working in September 2018. One participant worked under the Traditional model of employment services and was used as a comparison. As shown in **Figure 5**, participants in the TBSE model reported a slightly greater average level of work engagement (4.46) than participants in the Traditional model (4.39), however the difference between the two groups was not statistically significant. On average, both groups reported feeling positive levels of engagement at work in-between "Often" and "Very Often."

Figure 5 – Employee Level of Work Engagement



Although the small and uneven number of participants (4 in TBSE and 1 in Traditional) makes it difficult to draw strong conclusions that can be generalized with confidence, it might still be informative to examine trends in responses to specific items on the Work Engagement survey. **Figure 6** below shows participants' average responses to each of the items regarding *positive* feelings at work. Overall, average levels of positive feelings at work were similar between TBSE and Traditional employees, with a few exceptions, which can be observed in the figure.

Figure 6 – Employee Positive Feelings at Work

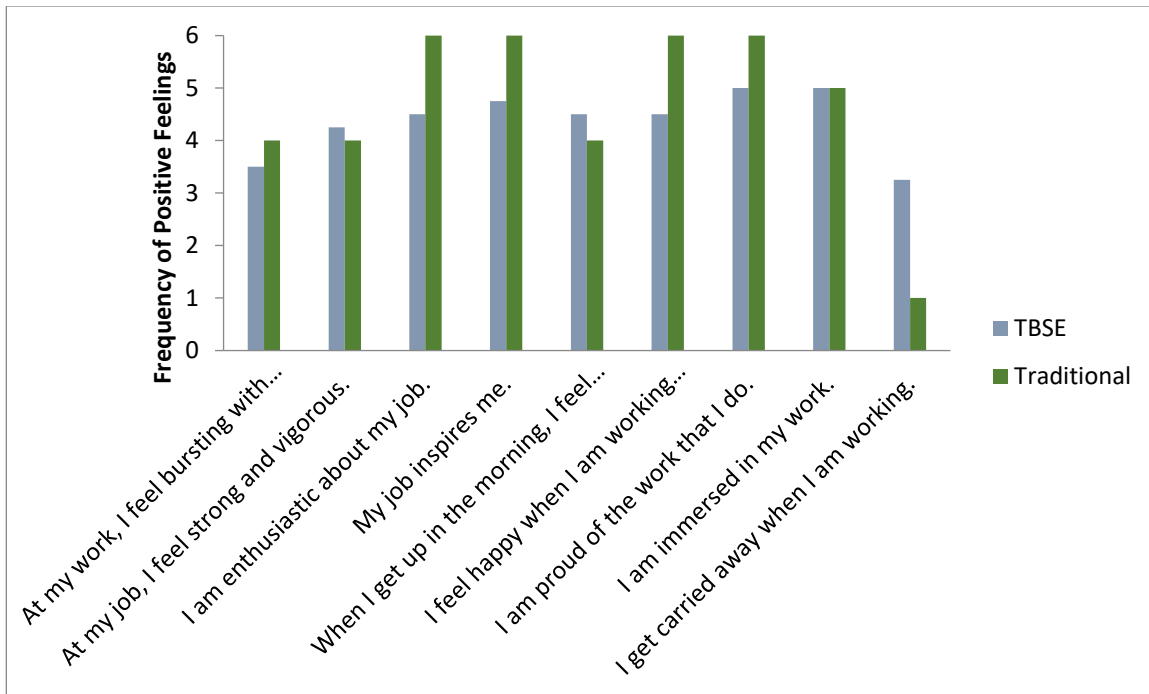


Figure 7 below shows participants' average responses to each of the items regarding negative feelings at work. Again, overall, the average ratings of negative feelings at work were similar between TBSE and Traditional employees, with some exceptions.

Figure 7 – Employee Negative Feelings at Work

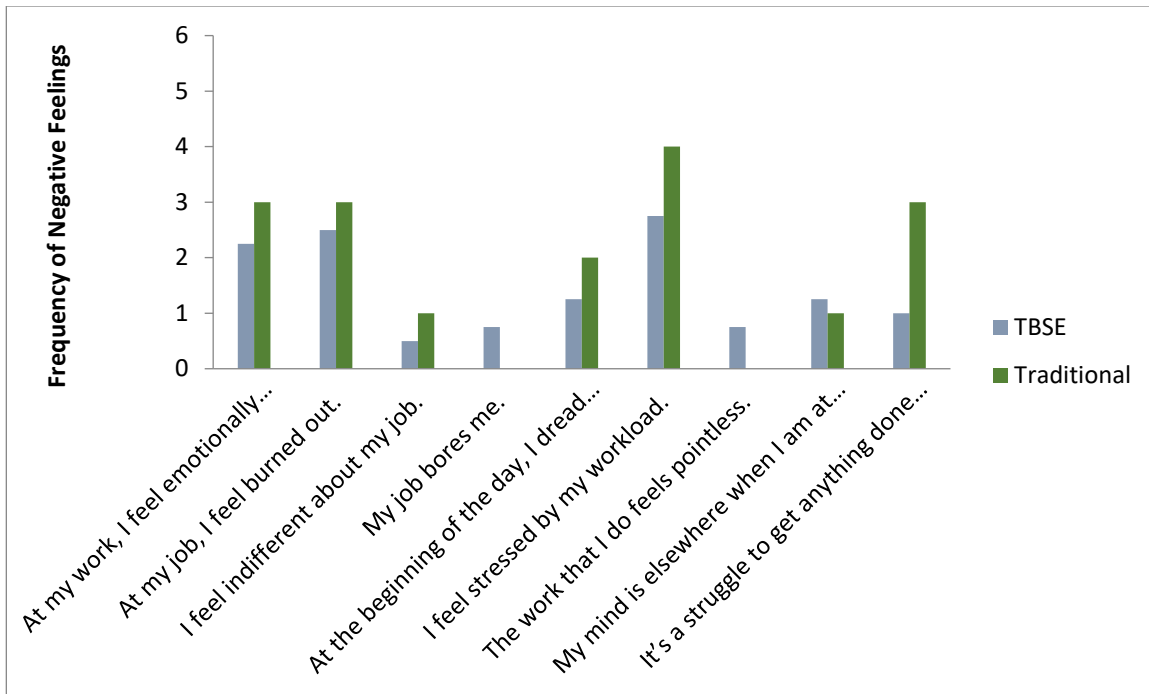
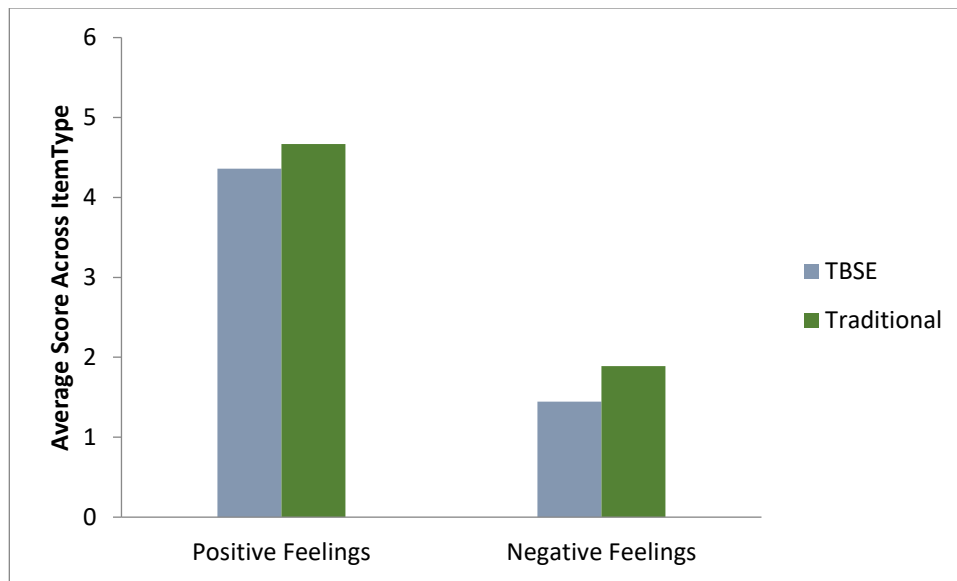


Figure 8 below shows a breakdown of average ratings of positive feelings compared to negative feelings on the survey across TBSE and Traditional. Although, both groups tended to indicate more positive feelings about work and fewer negative feelings, the participants in the Traditional employment model indicated slightly higher levels of both positive and negative feelings compared to those in the TBSE model. Again, given the small sample size and uneven distribution of participants, this result should be interpreted with caution.

Figure 8 – Comparing Employee Positive and Negative Feelings at Work



As a final analysis, because two of the employees in the study (E01 and E07) participated in taking the survey in June 2017 as well as in June 2018, it is possible to compare responses across these two time points spanning one year. Both participants worked in the TBSE model beginning in June 2017. **Figures 9 and 10** below show average ratings across the year for positive and negative feelings, respectively. As shown, both participants remained relatively engaged with work in the TBSE model at both time points, expressing higher levels of positive feelings (between “Often” and “Very Often”) and lower levels of negative feelings (between “Almost Never” and “Rarely”). Neither of the participants’ responses showed any significant changes between June 2017 and June 2018, indicating a relative level of stability in their work engagement over the span of a year.

Figure 9 – TBSE Employee Positive Feelings at Work Across Time

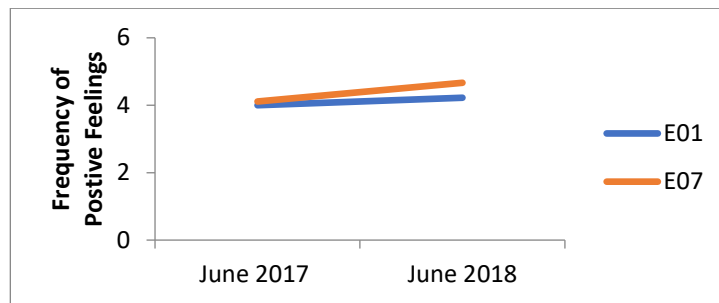
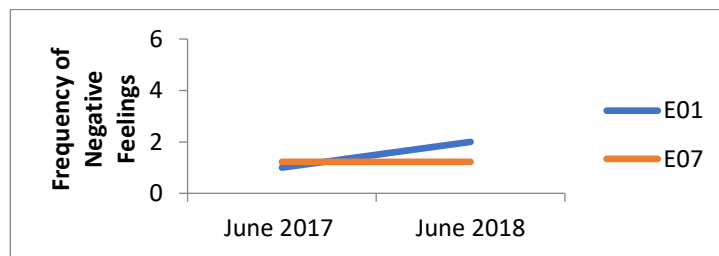


Figure 10 – TBSE Employee Negative Feelings at Work Across Time



Overall, these findings are in line with the idea that TBSE can help sustain employee engagement in the workplace by promoting positive affect through team support. Unfortunately, given the small sample of employees who participated in the study and the lack of more participants in the comparison group (Traditional model), it is difficult to draw strong conclusions about TBSE’s unique benefits on employee engagement over other employment models. However, taking into consideration other advantages of the TBSE model, it is notable that employee engagement and client satisfaction did not suffer and remained consistently high.

4. Revenue and cost analysis of team-based supported employment

TBSE Revenue and Expenses Within 2nd Metric Reporting

*Projected revenue from accounts receivable was not required due to up to date billing and actual revenue figures

Revenue Item	Amount	Expense Item	Amount
Total revenue for ISE	118,074	Employment Specialist Team Lead Labor Cost	\$9,319
Total revenue from VR	\$30,930	Employment Specialist Labor Cost	\$17,257
Accounts receivable for services yet to be paid from ISE months (11 months that are waiting to be billed)	*n/a	Employment Specialist Labor Cost	\$16,804
Total revenue	\$149,004	Employment Specialist Labor Cost (replacement ESP)	\$9,222
Total revenue (including Projected Revenue from Accounts Receivable)	*n/a	Admin cost and Benefits (40% of Labor Costs)	\$21,671
Total Profit/Loss	\$74,731	Total Expenses	\$74,273
Total Profit/Loss less VR revenue	\$43,801	Total Profit/Loss (including Projected Revenue from Accounts Receivable)	*n/a

Traditional Revenue and Expenses (Within 2nd Metric Reporting)

Revenue Item	Amount	Expense Item	Amount
Total revenue for ISE	\$7,619	Employment Specialist Labor Cost	\$22,031
Total revenue from VR	\$13,360	Admin cost and Benefits (40% of Labor Costs)	\$8,812
Accounts receivable for services yet to be paid from ISE months (11 months that are waiting to be billed)	*n/a	Total Expenses	\$30,843
Total revenue	\$20,979	Total Profit/Loss (including Projected Revenue from Accounts Receivable)	*n/a
Total revenue (including Projected Revenue from Accounts Receivable)	*n/a		
Total Profit/Loss	-\$9,864		
Total Profit/Loss less VR revenue	-\$23,224		

Narrative & Analysis - Written by Crystal Luna and Judith Kelsey

During the 2nd metric period, the TBSE Team had the Project Manager leave the company, the Team Lead step up and take over for the Project Manager, an Employment Specialist from the company (who was filling in while the Team Lead was on medical leave during the 1st Metrics period) promoted to the Team Lead position, E05 terminated from Abilities at Work, and E09 (newly hired Employment Specialist with limited training) added to the TBSE team. Still, the two remaining original TBSE team members noticed an improvement in results, even with the high turnover in personnel.

Training and Strengths

There is a better success rate in job placement when TBSE team members are fully trained before becoming a TBSE team. TBSE team members were able to cover each other's schedules when trainings or multiple appointments arose with no disruption in services to individuals. TBSE team members were able to take phone calls or answer questions regarding the shared TBSE caseload, even when the point person for that particular individual was not available. During the 2nd Metric period, the TBSE Team Lead and Project Manager created a one-stop tracking system that has cleared up any confusion on what needs to be done for clients, when things need to be done, and who is doing specific tasks. The TBSE team holds a weekly meeting with a preplanned agenda to keep everyone up to date. We have also noticed that our TBSE team members have naturally fallen into place based on their own individual skills and strengths that they bring to the team.

Transitions and Turnover

Transitions due to personnel turnovers during the 2nd Metrics period were more dramatic than the 1st Metrics period. Even with these turnovers, the TBSE team was able to provide seamless transitions in service to the individuals served. This remains the major strength in the TBSE model.

Note: The previous note from the 1st metric period still stands:

“It does seem important to limit turnover and transitions as much as possible (almost all these transitions were involuntary and was [sic] due to people moving or unforeseen circumstances). Solutions could include raising wages, offering more benefits, and using best practices to support these employees. By having a steady team and a group of individuals that can grow with each other, the hope would be to increase the placement rates and vocational rehabilitation closures.”

Final Report: Best Practices / Lessons Learned – Written by Judith Kelsey

Narrative & Analysis

JOB PLACEMENTS

The number of job placements for the TBSE model increased significantly in contrast to that of the Traditional model during the 2nd Metric reporting period compared to the 1st. From a questionably significant small lead in the 1st reporting period to a decisive advantage in the 2nd Metric reporting, the TBSE Team more than doubled their number of job placements. The Traditional model had 1 job placement in the first period and no placements in the second.

The TBSE team successfully leveraged the positive relationships they had developed with host employers to create additional opportunities for their job seekers. A total of 4 clients have benefitted from job opportunities directly linked to these intentionally cultivated relationships with employers where a successful placement has already been realized. All stakeholders typically meet more than one team member which provides a broader base for building relationships and deepening confidence.

VR CASE CLOSURES

The number of Successful VR Case Closures increased from zero to 2 from the 1st to 2nd Metric reporting periods for the TBSE model and remained constant at 1 in each period for the Traditional model. However, there was a notable difference between the TBSE and Traditional models in the number of Unsuccessful VR Case Closures over the course of the year: For the TBSE Team, unsuccessful closures remained steady at 2 in each period, while they rose significantly from 1 to 5 for the Traditional caseload. This difference in outcomes under similar circumstances raises questions regarding the sustainability of the Traditional management of individual caseloads compared to the productivity of the TBSE in managing a shared caseload. The loss of productivity in the Traditional model suggested by the number of unsuccessful VR closures is concerning not only with regard to a

delay or loss of funding streams, but also the long-term effect it might have on individual employee morale and turnover.

BUILDING SUSTAINABLE CAPACITY

The TBSE program has proven to be exceptional in keeping their clients employed. Since 5/1/17, only 3 of the 15 employed clients have left their positions, 2 by resignation and 1 by termination. Significantly, this high retention rate has provided a very stable revenue stream. Although the commitment of the employers to provide employment opportunities to individuals with IDD plays an important role, it is the consistent and high-quality services provided by the TBSE Team -- even when staff turnover is high -- that has been a major factor in job retention.

A high rate of job retention, generated by the seamless delivery and quality of services to supported individuals, produces a stable revenue stream that is key to building sustainable capacity. The continuity in delivery of person-centered services, as uniquely offered by TBSE, shows a rise in meeting the needs of client participants evinced by the increase in successful VR case closures. At the time of this writing, the TBSE Team is scheduled to address stabilization for two additional VR clients, necessary before successful VR case closure. Given the increasing trend in both job retention and successful VR case closures, there is every reason to expect that will continue to translate into increasing capacity building and sustainability.

Training & Strengths

TRAINING

One of the major factors for the increase in TBSE Job Placements and Successful VR Case Closures in the 2nd reporting period can be attributed to the increase in the amount of training and experience that team members gained and the effect that has on the degree and quality of collaboration. Capacity can only be built successfully when TBSE members are fully trained before coming on to the TBSE Team.

STRENGTHS

The effectiveness of the TBSE model has to do with how team structure and operations have developed. Central to TBSE is a shared caseload, wherein team members work together closely, providing integrated support for a genuinely shared clientele. This was achieved by employing the following practices:

Each client is assigned a Point Person on the team who is responsible for tracking the individual's progress, collecting data, and completing the necessary reports.

Weekly Team Meetings are used to ensure ongoing shared knowledge and person-centered support of clients. Points Persons give up-dates and progress reports on each of their prospective clients. The team members discuss job development and job coaching strategies particular to each client. The team problem-solves challenges by sharing their multiple perspectives and experiences of the individuals and bringing together a richness of diverse knowledge and experience to implement creative and effective solutions for each client.

Shared job coaching has shown to be particularly effective in deepening the person-centered quality of services provided by TBSE and is a clear advantage of the TBSE model. Client experience and learning is enriched by the opportunity to work with different team job coaches who have an integrated knowledge of the individual. This method of job coaching helps expand clients' interpersonal skills by modeling and facilitating interaction with multiple co-workers, thereby enhancing the development of natural supports in the work place.

Logistics that have been effective in promoting Team development and support include having a Team meeting space and shared office space. This facilitates team member interactions and communication and training support among team members. A Team calendar provides a thumbnail of all client related activities: client-VR Counselor-County Services Coordinator-Case Manager-Brokerage Personal Agent-Residential support team meetings, job coaching needs, job development activities, interviews, etc. The one-stop tracking system developed by the second Team Lead and Project Manager has been extremely valuable in organizing the myriad of state and county documentation and reporting required for each client.

Transitions & Turnover

During the 2nd Metrics reporting period of 12/1/2017 to 4/30/2018, both the Traditional model and the TBSE model experienced an unexpected number of turnovers in employee participants. In the Traditional model, which served as the comparison group, one employment specialist left in December 2017 and another left in March 2018. During that time, the group had no job placements, 1 successful and 5 unsuccessful VR closures. In comparison, the TBSE model also lost two employment specialists, both in April, yet had 4 job placements and 2 successful and 2 unsuccessful VR closures.

The Major advantage of the TBSE model lies in the Team structure and configuration that builds capacity while providing continuity in delivery and quality of service, ensuring seamless transitions in service to the individuals served. It has been shown to be effective in covering job development and coaching schedules, trainings, appointments, and meetings among the employment specialists on the team. The dramatic events of three weeks in April demonstrate the strength and capacity of the team structure: Within one three-week period in April, the TBSE Project Manager left the company, another team member was terminated, the TBSE team negotiated 4 new job placements, 4 to 5 work days per week each, at 4 different sites, and provided intensive initial job coaching for those 4 clients, while still managing to cover six pre-arranged off-site staff absence days for training and leave. The strength and resiliency of this collaboration is possible only when the team members are fully trained before coming onto the TBSE Team.

As emphasized in both the 1st and 2nd Metrics Reporting Periods:

“It does seem important to limit turnover and transitions as much as possible ... Solutions could include raising wages, offering more benefits, and using best practices to support these employees. By having a steady team and a group of individuals that can grow with each other, the hope would be to increase the placement rates and vocational rehabilitation closures.”

That hope is well-grounded in the 2nd Metric reporting which shows that TBSE, even in stressful conditions, does indeed increase client job placement rates and successful VR case closures, thereby producing a very stable revenue stream. Reinvesting in TBSE by strengthening employee supports would benefit all stakeholders.