

MG&A

DISCOVERY

CERTIFICATION

HANDBOOK

2021



Marc Gold & Associates

The People Who Try Another Way

Marc Gold & Associates Discovery Certification Handbook

Welcome

Welcome to the Discovery Certification Process!

Now that you have completed the 3-day gateway training on Discovery and have decided to work toward certification, this handbook will describe the requirements for certification. The training that you will receive, the Mentor who will guide you through this process and the resource materials you have been given will provide a wealth of information to support your quest for certification. This is a performance-based certification in that you will actually be performing the Discovery process while you learn. In order to successfully fulfill the requirements for certification you will have to complete Discovery activities, the written Profile documents, the Customized Plan for Employment and the Visual Resume to the satisfaction of the MG&A Mentor.

For Discovery Certification, the Coordinator is Randy Dicks of Pittsburg, PA (randydicks718@gmail.com). Randy's work in the human services field stems back to 1993, and he first started doing Discovery in 2004. He has worked closely with MG&A since that time, coming on board as a consultant in 2013.

You will be assigned a personal Mentor by Randy after your registration form has been received and the registration period has ended. Your Mentor will have 7 hours to Mentor you through the Discovery process. Be sure to read and understand the information in each section of the handbook. If you have concerns or questions discuss them with your Mentor.

The goal of Discovery certification is to develop skills in determining contributions, interests and conditions of a Learning Partner who experiences significant impact of a disability, using a qualitative, descriptive, non-evaluative process. Documenting these descriptions in a profile document, developing a customized plan for employment and creating a visual resume are also skills you will acquire.

You must negotiate with your supervisors at work for the release time necessary to complete the activities that are required. You must communicate with your employers to assure that funding is available to support employment opportunities that may be developed as a result of this process. You will need approximately 40 – 50 hours over the **20-week period**.



Discovery Requirements

To be successful with certification, you will need to fulfill the following requirements to the satisfaction of the MG&A Mentor.

1. You will be required to identify a Learning Partner with an intellectual/developmental disability with whom you will facilitate the Discovery process, write the Profile documents, complete the Customized Plan for Employment, and build the Visual Resume. This person and his/her family must be voluntarily willing to allow you to facilitate Discovery and to give you permission to talk to others about his/her life, take digital photos and/or videos and to share your Discovery notes, photos and Profiles with your MG&A Mentor for purposes of your certification. When you decide to pursue certification, you should immediately begin seeking a Learning Partner. MG&A recommends that you have a “back-up” Learning Partner in case your initial Learning Partner decides not to participate. Please check with your Learning Partner’s agency for any required releases of information forms so that information can be shared with Marc Gold and Associates. The release of information should specifically state Marc Gold & Associates. Mentors and the MG&A coordinator will be reviewing all forms, so it is essential that we have permission to view the information required for certification.
2. You will be required to complete the following forms.
 - a. Discovery Signature Page – a form stating that you have read the handbook and agree with the conditions for certification.
 - b. Agreement to use MG&A Discovery Webinar Series – a form giving you permission to view the webinars. This form is emailed to marcgoldassociates@gmail.com.
3. You are required to watch 6 webinars, read the 4 Discovery manuals and all articles assigned. “The Discovery: Charting the Course to Employment” manual should be read first. Upon completion of the Discovery manual, begin the “Profiles: Capturing the Information of Discovery” manual. “The Customized Plan for Employment” and “Visual resume” manuals refer to parts of the process that take place after the Profile has been completed. Please note, you will want to read these allowing yourself enough times to feel confident with these processes once the profile is complete. Both of these steps will come right after the Profile is approved.

Webinars titles and a suggested order of viewing are as follows. (Please note there is no Webinar #2.)

1. DJ Customized Employment: Overview
- #3 Discovery: Steps and Tools
- #4 Accounting for Discovery
- #5 Capturing Discovery
- #6 The Profile Format
- The Customized Plan for Employment



Your Mentor will question you on the webinars.

4. Your Mentor will ask you to provide a proposed schedule of activities for Discovery and your plans for completing Discovery. The total time spent in the Discovery activities will range from 20 - 40 hours. This schedule will serve as a guide for you and help you meet your deadlines. It is common for adjustments to be made due to inclement weather, family emergencies, etc. So, don't panic if you have to tweak this schedule. You can use the Activity Log as the guide for your proposed schedule.
5. Hold an initial meeting of Discovery with the Learning Partner and selected supporters to kick off the process and to explain in depth, the details and expectations. Your time spent on the initial meeting should be recorded in 1A of the Activity Log.
6. Scope out the neighborhood of the Learning Partner, describing relevant features as described in the manual and Profile guide. Take notes of these features.
7. Conduct an initial visit to the home of your Learning Partner. During this initial visit, you will be starting the Discovery process. This initial visit should not last any longer than 1 hour. Your time on this initial activity should be recorded in 1B of the Activity Log and notes must be taken.
8. Re-visit the Learning Partner's home for 2 – 4 additional visits to collect the information required for the profile. Make sure to review the sections of the profile to insure you are documenting and observing all required components. These visits include your observations of the neighborhood and surrounding businesses, available transportation, etc. Your time on these visits to the home and neighborhood will be recorded in Section 1B of the Activity Log and notes must be taken.
9. Interview a balance of people who are friends and people who are paid to provide services to the Learning Partner. Interview the people who know the Learning Partner best and most positively. You will need to interview each of these identified people two or three times to have enough information and descriptive notes. These visits will be recorded in Section 1C of the Activity Log and notes must be taken.
10. Observe the Learning Partner 4-8 times in typical life activities. These visits will be recorded in Section 1D of the Activity Log and notes must be taken.



11. Participate with your Learning Partner as a colleague in activities of typical life for the individual. This will include spending time in familiar places doing things the Learning Partner routinely does. These times will be recorded in Section 1E of the Activity Log and notes must be taken.
12. Towards the end of Discovery, observe or participate with, as appropriate, the Learning Partner in a community activity in which they are most familiar, most competent and most comfortable. Consider visiting the site of the activity prior to this experience to understand the expectations for successful participation, the steps for performing the activity and subtleties such as proper dress, behavior, etc. At least one of these activities is required and no more than two should be performed. These activities are recorded in Section 1F of the Activity Log and detailed notes must be taken.
13. After completing a familiar activity, observe or participate with, as appropriate, the Learning Partner in a community activity which is novel to the Learning Partner but which otherwise is consistent with their interests and conditions for success. Make sure to get suggestions from family members on these activities. At least one novel activity is required and no more than two novel activities should be performed. These activities are recorded in Section 1F of the Activity Log and detailed notes must be taken.
14. Review permanent records (school, Vocational Rehabilitation, etc.). Note challenges, solutions, patterns and optimistic staff. Consider interviewing staff with optimistic comments. Time spent on these activities will be recorded in Section 1G of your Activity Log and summary notes must be taken.
15. Submit your Activity Log. Your Mentor will ask for your log at checkpoints throughout the process. Make sure you update your log as you progress through the activities. The MG&A Certification for Discovery Activity Log is the required format. Since you will submit this log through scanning or fax, please use dark ink when completing the logs. You will find the Activity Log at Marc Gold's website and a digital copy will be provided by your Mentor. *Please remember to account for travel and Discovery activities separately.*
16. Submit representative copies of your Discovery notes. There is no required format for your Discovery notes, but we strongly recommend that you take notes in a descriptive and narrative format whenever possible. The purpose of submitting copies of your notes is for the Mentor to guide you in becoming more descriptive and staying away from evaluative terms. Once the Mentor is comfortable with your note taking skills, the Mentor may determine that he/she no longer needs you to submit Discovery notes.



17. Collect digital photos and/or “short-burst” videos you have made of your Learning Partner during the Discovery process. Before taking photos, make certain you have a signed release for taking photos/videos. Your agency can provide you with these release forms. These photos will serve as your photo library from which you will develop the visual resume for your Learning Partner. You will need one photo in which your Learning Partner poses for the picture—one that is respectful. All other photos should provide imagery that shows competent performance in work experiences, home responsibilities and community involvement. Be sure to include photos that capture specific skills and interests. With the exception of the one photo that will introduce your Learning Partner, photos should not be posed “photo ops”. Make sure your Learning Partner is looking at the task he/she is performing and not looking at the camera. Be careful with videos. While videos of activities can be very powerful and helpful in describing your Learning Partner, uploading long videos can be problematic. Aim for short bursts of videos.
18. Submission of Part 1 of the profile. The 2019 MG&A form is the required form to complete. You will go to the [Marc Gold website](#), for all required forms. Your time spent on this requirement will be documented in Section 1B of the Activity Log.
19. Submission of Part 2 of the profile. You are required to **submit one section at a time of Part 2**. Select one portion of Part 2 to write. Once you complete the selected portion, submit that portion to your Mentor. Your Mentor will critique the submitted section and make recommendations for changes, rewording, etc. Completing a section at a time keeps Part 2 from becoming too overwhelming for you. Again, the MG&A 2018 form is the required form to use. You must not proceed to Part 3 of the profile until your Mentor has approved every section of Part 2. Part 2 of the Profile is the heart of the Discovery process and is the most challenging part to write. Make sure you review the guide and the sample for Part 2. These two resources are a tremendous aid for you. Your time spent on Part 2 of the profile will be documented in #2 of the Activity Log.
20. Submission of Part 3 of the profile. Make sure to use the 2019 MG&A form. Part 3 can be completed in bulleted form, with the exception of the Challenges section. The Challenges section must be written in narrative form. You will find that Part 3 progresses much more quickly than Part 2. Remember to review your guide and sample of Part 3. Your time spent on this activity will be documented in Section #2 of the Activity Log. Upon receiving approval of your completed Part 3, you may begin the Customized Plan for Employment.



21. Set up and facilitate a Customized Plan for Employment Meeting (CPE) for your Learning Partner following the guidelines in “The Customized Plan for Employment” manual and as directed by your MG&A Mentor. Record the facilitator’s role and submit both the video and completed Customized Plan for Employment worksheet to your MG&A Mentor for approval. You are required to submit video portions of the CPE meeting. The following components are required to be videoed and submitted to your Mentor:
 - 1 minute of the introduction
 - 1 minute of What Works/What Doesn’t Work activity
 - 1 minute of the discussion of Characteristics of an Ideal Job
 - 1 minute of Types of Job Tasks activity
 - 1 minute of the Specific Employer List activity

You will find the Customized Plan for Employment worksheet on the [Marc Gold website](#). There is also a worksheet sample for you to review. Your time spent on this activity will be documented in Section #3 of the Activity Log.

MG&A has prepared step by step videos on how to set up your Dropbox, make a video, edit and upload your videos to a Dropbox.

Dropbox [How to Setup and Use a Dropbox](#)

Recording and Editing Videos Part 1 [Video on Recording and Editing Videos Part 1](#)

Recording and Editing Videos Part 2 [Video on Recording and Editing Videos Part 2](#)

How to Upload Videos [Video on How to upload videos.](#)

22. Develop a Visual Resume that can be used to represent your Learning Partner to potential employers and submit a digital copy to your MG&A Mentor for approval. Your time spent on this activity will be documented in #4 of the Activity Log. See #21 for information on how to upload to Dropbox.
23. Pass a content test with a minimum of 70 % accuracy. You will have three opportunities to achieve this accuracy level.

Process Note: If your area is impacted in any way by COVID, please keep your mentor informed. They will work with you to help you determine virtual activities that maybe completed or adjust your timeline for the completion of the Certification process.



Grading Guidelines

The Grading Rubric located in the Appendices is used by Mentors to document unacceptable, acceptable or outstanding progress. MG&A strives to push participants beyond the acceptable standard into the outstanding standard. The Discovery process is an evolving process—the more Discovery you do, the better you become. It is a continual growth process. Potential Mentors for your state are identified on the basis of outstanding performance. In the appendices, you will also find a document titled, “The Essential Elements of Discovery and the Documents of Discovery”. This document is what our grading rubric is based on. In order to be successful with Discovery and to maintain the integrity of the Discovery process, the Essential Elements must be met. Please refer to these Elements frequently and continue to refer to them after you are certified to maintain the quality of the Discovery process.

Our mission is to guide you to be successful with the Discovery certification process and maintain MG&A standards. When you seek re-certification in three years, MG&A will expect to see growth/improvement in your Discovery process—not just maintaining the basic acceptable standard.

It is expected that you will receive different feedback from your Mentor than some of your colleagues receive from their Mentors. Different feedback is not contradictory--it is based on your Learning Partner's circumstances, your skill level and MG&A's desire to push participants into the outstanding standard. If you begin to feel overwhelmed or uncertain about your success in the process, please do not hesitate to talk to your Mentor or Coordinator.



Responsibilities of the Person Seeking Certification

It is your responsibility to read all documents given to you, including the Discovery Certification Handbook, and watch all webinars. You should respond to any emails your Mentor sends to you. You should participate in all conference calls set up by your Mentor.

Timeline for Certification

Please be aware that MG&A fully expects participants to complete the certification process within the **20-week** timeline. MG&A does recognize that family/health issues do occur. MG&A has developed the following policies with regard to extending timelines for participants.

Delayed Start

1. When a Mentor has made the first contact with you, you are expected to already have identified a Learning Partner. However, if you do not have a Learning Partner, we will give you a two-week window to locate a Learning Partner. After that, MG&A will place you on hold until you have a Learning Partner--it is then your responsibility to let MG&A know when you have a Learning Partner. When you do contact MG&A, MG&A will then determine whether to grant permission for you to move forward. In no case, will permission be granted to continue if you have been on hold for six months or longer. The six months starts from the last day of your Discovery Gateway Training. Depending on the original Mentor's schedule and work load, you may or may not have the same original Mentor.
2. If you have registered for an additional area of certification but you have not yet completed the requirements for certification in your current area, it is possible to request a delayed start until you do complete the requirements in your current area of certification. However, you must start the additional area of certification within six months of that area's gateway training.

Extensions

If it becomes apparent to the Mentor that you will not meet the 20 weeks' deadline or if you are unable to meet the quality standards expected, the Mentor will make a decision based on the following MG&A timeline extension policies.

1. Reasonable exceptions to the timeline are: medical emergencies, family emergencies, health issues and issues with Learning Partners (moving, etc.) When the participant experiences any of these situations, extensions can be given, and no extension fee will be assessed. A new timeline will be established.



2. Supervisors at times will ask for extensions for the participant because of unanticipated work load increases. We certainly recognize these unanticipated issues and will grant extensions based on these exceptions. However, the agency will be required to pay a \$75.00 extension fee per participant.
3. If you have been responsive during the process but have struggled and have begun to show a potential positive outcome and will need an extension to complete the process, an extension will be granted. However, you will be assessed a \$75.00 extension fee. If you have also used all 7 hours of Mentoring, additional Mentoring hours will have to be purchased separately from the extension fee.
4. If you have not been responding to Mentor emails and haven't been turning in work in a timely manner and then find you cannot finish within the 20 weeks, an extension will not be given.
5. MG&A does not recommend a participant pursue two areas of certification at any point during the same 20-week time period—each area's requirements are too extensive to accomplish in the same 20-week time period. Please realize that if you choose to pursue two areas during the same 20-week time period, time extensions will not be granted based on the pursuit of two certifications simultaneously.

Quality Performance

Participating in the certification process does not guarantee you will earn a certificate. You must meet MG&A standards as outlined in the Grading Rubric and The Essential Elements of Discovery Chart and determined by your Mentor.

If it is apparent to your Mentor at the completion of Part 2 of the Profile that you are not meeting the quality standards, your Mentor may decide to discontinue your certification process at this point. If this occurs and you wish to start the process over, you must pay a new, lower fee for certification that pays for a Mentor's time. If more than one year has elapsed from the time you attended the three-day gateway training, it will be necessary to start anew with a full payment for certification.

If you are still within the 20-week timeframe but have used the 7 hours of Mentoring time provided in your fee and if the Mentor believes you are making successful progress, you or your agency may be charged an additional Mentoring fee of \$75/hour until you complete the process. MG&A monitors the Mentoring time and will contact you and your agency should we see this become a possibility.



The Mentor will make these decisions based on MG&A's policy for extensions, your performance and your response to calls, emails, timelines and requested edits. The Mentor will also include the Coordinator of the Discovery Certification, as well as your employment supervisor in reaching these decisions.

Ethical Standard

MG&A provides you with manuals, samples of work to be performed, PowerPoints and webinars to use as resources. Our goal is to provide you with resources that will enhance your opportunity for success. Please make certain that you do not copy information from our resources or from other participant's work and submit as your own work. If your Mentor does find an inadvertent plagiarism error, the Mentor will call your attention to the error and ask you to correct the form. However, if the plagiarism is major (copying entire sections, submitting someone else's work as your own), you will be dropped from the certification process without any refund and will lose the opportunity to seek further certification from MG&A.

For participants pursuing Job Development certification, you might use terms within negotiables and terms within the Concept Portfolio that are similar as the ones presented in your sample. This is permissible as long as the narrative defining the concepts for the terms are in your own words and if you notify your Mentor of this action.

Please sign the last page of this handbook and send to your Mentor to indicate your understanding of the requirements of this certification and your responsibilities in meeting the requirements.



Discovery Signature Page

Please Sign:

As an individual applying for certification in Discovery from Marc Gold & Associates, I have read and understand the requirements for certification and my responsibilities involved.

Printed Name of Individual

Individual's Agency

Signature of Individual

Date



Marc Gold & Associates
The People Who Try Another Way

APPENDICES



Discovery Grading Rubric

Participant's Name:

Group Code:

Requirements and Timelines	Outstanding	Acceptable	Unacceptable
Met all expected timelines as specified in handbook and emails			
Proposed schedule			
Discovery notes			
Submitted sections of Profile as requested			
Final submission of Part I on time			
Final submission of Part II on time			
Final submission of Part III on time			
Submission of CPE on time			
Submission of Visual Resume on time			
All Activity Logs			
Participated in phone conferences			
Responded to emails			
Quality of Part 1 of Profile			
Evidence that the participant toured the neighborhood and surrounding commercial areas			
All sections of Part 1 are complete with an absence of evaluative language and labels.			
Quality of Part 2 of Profile			
Final version of Part 2 is relatively free from evaluative language			
Final version of Part 2 is positive and optimistic			
Final version of Part 2 robustly describes performance			
Final version of Part 2 is robust in its descriptiveness and depth to allow for translation.			
Final version of Part 2 is professional and respectful			
Final version of Part 2 has evidence of novel and familiar activities			



Requirements and Timelines	Outstanding	Acceptable	Unacceptable
Final version of Part 2 has evidence that the participant met the minimum number of required observations			
Quality of Part 3 of Profile			
While there may continue to be some minor confusion re: section to place information, the information is clear and consistent with the information in Part 2.			
Conditions, interests and contributions are captured			
Challenges, as well as, solutions for the challenges are described and the use of labels is avoided			
Information that is considered sensitive is described in the sensitive section			
Potential employers' list takes into account the Learning Partner's conditions for success and interests			
Customized Plan for Employment			
Video indicates participant spent time with the Learning Partner/family explaining purpose of meeting, and "trumps" concept			
Participant acted as the facilitator			
Participant completed all steps of the CPE			
Participant submitted video sections of the meeting			
Visual Resume			
Pictures are good quality and are respectful of the person			
Resume has a professional quality			
Highlights contributions of the Learning Partner			
Last slide has job tasks described			
Test			
Passed test with 70% accuracy: 1 st 2 nd 3 rd attempt			



The Essential Elements of Discovery and the Documents of Discovery

WINTAC and Y-TAC partnered with MG&A, Griffin-Hammis, TransCen, Inc and Virginia Commonwealth University to develop essential elements of Customized Employment. These elements provide the opportunity for universal application across service delivery and training providers. The following are the essential elements for the Discovery portion of the Customized Employment process. These essential elements are standards MG&A embeds in the Discovery certification process and adherence to these elements is required for certification.

1. Conducting Discovery and Creating Discovery Documents

	Outstanding	Meets Standard	Standard Not Met
A. Determination of the individual's strengths, needs, and interests should be the result of a qualitative approach of Discovery. If all employment seekers are to be considered for employment, CE services should focus on the determination of the best aspects of the employment seeker and avoid using traditional, comparative assessments that inevitably focus on deficits and challenges.			
B. The Discovery process used should include the recognized strategies of qualitative research, such as interview, observation, participation with the employment seeker, and records review. Since qualitative procedures have not traditionally been used to understand the employment seeker, CE practitioners need to develop the skills necessary for quality facilitation of a qualitative strategy.			
C. Discovery facilitation should strive to view the employment seeker descriptively rather than evaluatively. Traditionally, human service staff and VR counselors have been trained and socialized to view employment seekers evaluatively, comparing them to others and to standard expectations. Discovery proceeds from a descriptive perspective that focuses on detailing what occurs rather than how staff feel about what has occurred. Notetaking is an aspect of the professional standard of qualitative research. Facilitators should seek to capture all Discovery interactions using descriptive notes that remove the evaluative perspective. The facilitator's notes should be offered to both the employment seeker and the funder. Notes should be based on direct observation and non-speculative information from primary sources, including family and others who know the individual well. Additionally, notes should be shared with additional stakeholders identified by the employment seeker, such as family, friends, school, and residential providers.			
D. Discovery should include interviewing the employment seeker, the family/ natural supporters, and friends. Interviewing is a fundamental aspect of qualitative research and facilitators should strive to ask prepared questions in a way that feels conversational.			



	Outstanding	Meets Standard	Standard Not Met
E. Discovery should include observations of and participation with the employment seeker in typical aspects of their lives. Observations of typical life activities—in situations where the individual is at their best—offer facilitators rich information and can assist the facilitators to identify skills and determine factors that need to be in place to help ensure successful employment.			
F. Discovery should include an “optimistically” focused review of records pertaining to the employment seeker. While most permanent records are evaluative, and deficit focused, a review of existing information provides a comprehensive perspective of the individual and provides detail that might not be found during Discovery interactions. Facilitators should be careful to keep a positive perspective when reviewing this information. It is helpful to wait until the end of Discovery to begin record review.			
G. Sufficient time is an essential component of quality Discovery. Facilitators and funders should strive to balance the need to spend more time to better get to know the individual with the need to keep the customized employment process moving forward. Current evidence-based data indicate that the average timeframe for Discovery is 35 hours over five to seven weeks.			



The Essential Elements of Discovery Documents: The Profile (MG&A)

	Outstanding	Meets Standards	Standard Not Meet
<p>A. Discovery findings should be detailed in a comprehensive, narrative document that provides sufficient information to assist the employment seeker to plan for customized employment. This document should be narrative, descriptive, optimistic, non-evaluative, and non-comparative. The Discovery document should be of sufficient length to fully describe the individual and to provide information for planning. These characteristics of style uniquely define the Discovery document in relation to traditional assessment reports that are too often comparative, deficit-focused, quantitative, and brief. Discovery provides the evidence for the recommendations for career development and needed services and supports.</p>			
<p>B. The Discovery document should identify the individual and their living situation, family, friends, and current life status. The Discovery document should contain sufficient demographic information to assist employment staff to understand details about the individual, family, living situation, and location in the community.</p>			
<p>C. The Discovery document should describe the individual's life experiences, including past employment, education, life activities, skills, and other relevant features. The Discovery document should provide a comprehensive description of the domains of life that will affect or be affected by employment. This information should be provided in narrative form, avoiding charts, tables, numerical data, and other comparative and evaluative perspectives. Care should be taken to focus on the individual and avoid the opinions of the facilitator, professional staff, family members, and others.</p>			
<p>D. The Discovery document should provide preparation for the employment plan to customize an employment options. The Discovery document should summarize information gathered in a way that identifies the strengths, needs, and interests of the employment seeker so it can inform those designing the plan for customizing a job with the individual.</p>			
<p>E. The Discovery document should be "owned" and approved by the employment seeker. This</p>			



	Outstanding	Meets Standards	Standard Not Meet
<p>element helps ensure that this is a confidential document—like an authorized biography rather than an unauthorized exposé written by workforce development staff. The fact that some employment seekers may have complex and challenging lives should not subject them to embarrassment and loss of confidentiality because of Discovery and the resulting documentation. Facilitators should demonstrate discretion in an effort to support dignity. These challenges can be documented in a way that only those needing the information for purposes of negotiating employment can have access. Dissemination and use of this document is subject to the approval of the employment seeker.</p>			
<p>F. The descriptive notes developed during Discovery and the Discovery document, upon approval by the funder, should be considered as evidence that Discovery has taken place for purposes of receiving payment from VR or other funding sources.</p>			
<p>G. Minimal standards for the activities that compose Discovery, the format and detail of descriptive notes to be taken, and the depth of the Discovery document should be set by funders, such as VR and other funders. Although there may be variety in the manner in which Discovery and the accompanying document can effectively be developed, a set of minimal expectations or technical standards should be set by funders and should be referenced in contracts that authorize services.</p>			



2. Plan for Customizing Employment

An expected standard for any rehabilitation or employment service is the development of a plan that articulates the individual’s goals and charts the direction of CE services. In CE, the job is to be customized and driven by the individual, a dedicated plan for customization is necessary to assure that job offerings reflect the wishes of the employment seeker rather than job openings or existing relationships held by employment specialists. This plan, which should be derived from a planning meeting, should follow Discovery and the development of the Discovery document and should be disseminated, with approval of the individual, to those who are invited to the planning meeting.

The Essential Elements for a Plan for Customizing Employment

	Outstanding	Meets Standard	Standard Not Meet
A. The planning meeting should be held in a timely manner following Discovery and completion of the Discovery document. The more time that elapses between Discovery and the CE plan, the less potent the information will be. A planning meeting should be scheduled between two to four weeks following Discovery.			
B. With assistance as necessary, the employment seeker should approve all aspects of the planning meeting and plan for customizing employment. No aspect of a planning meeting should be decided on without the direct approval of the employment seeker. If the employment seeker needs assistance to understand the planning process and to make decisions, assistance may be provided by family, friends or an ombudsman whose primary duty is to the individual.			
C. The planning meeting must be facilitated by an individual who participated in the Discovery process. To assure valid customization, the plan must be facilitated by staff who participated in getting to know the individual.			
D. Those attending the planning meeting should be individuals who know the employment seeker, including individuals invited by the employment seeker and family. Those invited to attend the planning meeting should be individuals who have a relationship, personal or professional, with the employment seeker. If it is felt to be useful to invite a person who does not have a relationship with the individual, such as a community member with ties to the employer community or a behavioral specialist, permission should be granted by the employment seeker or family, as appropriate.			
E. Those attending the planning meeting should be provided copies of the Discovery document, with permission from the employment seeker. The Discovery document is the collected information source for those attending the meeting. Agency staff should obtain permission from the employment seeker to share the document with those attending. Some employment seekers may request that the document be collected following the meeting to help maintain confidentiality.			



	Outstanding	Meets Standard	Standard Not Meet
F. The planning meeting should be attended by the job development or employment specialist who was involved in the Discovery process who will be contacting potential employers in efforts to negotiate a customized job.			
G. The goal is to have at least as many individuals invited to the planning meeting who are not paid to attend as those who are paid to attend. This element of the plan seeks to establish a balance of power between the wishes of the individual and the needs of the agency and funders. Establishing this balance may require that the planning meeting occur during evening or weekend hours. Willingness to accommodate schedules outside of “traditional” business hours may be necessary.			
H. The planning meeting should provide a recap of the employment seeker’s strengths, needs, and interests as compiled in the Discovery document. Even though those attending the plan have a copy of the Discovery document, it is useful to outline the employment seeker’s strengths, needs and interests so everyone is on the same page.			
I. The planning meeting should generate a list of job tasks that fit the employment seeker to be offered to potential employers. Since CE is predicated on job tasks that fit the employment seeker, the plan should develop a set of tasks, in employer language, that can be offered to potential employers during job development.			
J. The planning meeting should include a listing of specific employers, consistent with the employment seeker’s strengths, needs, interests, and vocational themes identified through the Discovery process, that will provide a job development blueprint for making employer contacts and should include any information that may have been collected through informational interviews with employers and their openness to be approached regarding various customization options. To help ensure valid customization, the plan should identify and prioritize a list of specific employers, including small, artisanal businesses that are consistent with the employment seeker’s interests and match their strengths and needs with the needs of the employer.			
K. A copy of the plan for customizing employment should be provided to both the employment seeker and to the funder. Following the planning meeting, a typed copy of the results should be provided to both the employment seeker and the funding partner, such as is the case with an IPE in traditional VR process. This allows for a comparison of the plan with the actual outcome.			

This chart was developed from “The Essential Elements of Customized Employment for Universal Application” published by WINTAC June 2017.



TIPS FOR SUCCESSFUL COMPLETION OF DISCOVERY CERTIFICATION

Start early: Begin to identify a Learning Partner when you submit your registration form for certification. Your Learning Partner should be someone who has an interest in obtaining employment. If your Learning Partner is school-age, expect to meet with the building principal and the Director of Special Education to gain entrée into the schools. We suggest you do this early in the process as you might have to undergo a background check.

Discovery is a process: Understand that Discovery is a process, and not just another service that is offered. To do effective Discovery and complete certification, you have to be invested in learning and understanding the process. Discovery seeks to understand who the person is and what the person does.

Explain the Process: Ensure that your Learning Partner and the family understand the process and will commit to the entire process. This assists in completion of certification in a timely manner and also avoids delays in having to identify a new Learning Partner mid-process and having to start over.

Profile: The information that we learn in Discovery is captured in the Profile. Please keep in mind that we want to use positive, person-first, and professional language in the Profile. The Profile is a document that helps us learn who the person is, what they do, and what supports are needed to assist the person in being successful. Keep in mind, the profile is not a plan. It is not a place for goals to be written or to identify areas the facilitator believes to need improvement.

Pay attention to the webinars: There is a lot of information in the webinars that is meant to help you understand and be prepared for the Discovery process.

Write descriptively: Avoid the use of evaluative and subjective words. Some words to avoid include: can, will, able, often, enjoys, likes, loves, etc. Writing descriptively can be challenging; however, your Mentor will guide you through this process.

Use action statements: Rather than using evaluative and subjective words, write what you mean. Some examples may include:

*Tom mows the lawn with a push mower once a week, instead of,
Tom can mow the lawn.*

*Jenny completes internet searches by using the mouse to click on the internet explorer button. She then types google.com in the search bar. Jenny then clicks on the search box and types skydiving videos. When the results appear on her screen, she clicks on the links to watch videos of skydiving. As Jenny watches the videos she smiles, giggles, and says "that looks like so much fun, I want to do that", instead of,
Jenny likes skydiving videos.*



Observation vs. Interviewing: Observation and interviewing are both an important aspect of Discovery. It is important to talk to people who know the person best to gain insight from their perspective. It is also critically important to spend time observing the person actually doing activities. When writing descriptively, it should be apparent in the Profile what activities you have personally observed.

Discovery Activity Log: Your Discovery Activity Log is set up to outline all the tasks and activities that must be completed during Discovery. Please ensure that you are completing at least the minimum requirements in each section. Keep in mind that minimums are just that, minimums. If you feel you need more information about something, do another observation. Please complete your discovery Activity Log as you go through the process. Do not wait until the end to complete this document.

Block out time: Upon beginning the Discovery Certification Process, it may seem like 20 weeks is a lot of time to complete all the requirements of certification. The allotted time for completion is sufficient, however there will be other demands (work, life, etc.) that you experience while going through certification. If you don't specifically block out time to complete all your requirements, including time for writing and editing, you will soon find that you have not completed certification within the timeframe and will run the risk of not becoming certified. Also, keep in mind that your Learning Partner is someone who has expressed an interest in obtaining employment. You want to remain aware of the fact that how you spend your time will have an impact on this person.

Use your Mentor for support: If you are unsure how to proceed or how to write something you've observed, contact your Mentor to seek support.

Edits: Your Mentor will provide you with edits for each section of the Profile. These edits may ask for more information. It is common for a Mentor to ask "what does it look like". When writing the Profile, ask yourself "what does it look like" and then describe what you see your Learning Partner doing. This will save time in the editing process. Also, keep in mind that your Mentor may point out areas where more description is needed. When a Mentor does this, keep in mind that these things should be consistent throughout your Profile. Ensure that you are using descriptive language and capturing what your observations look like throughout. It is often helpful to follow-up with a phone conversation with your Mentor after edits have been received.

Photographs: Take pictures throughout the Discovery process. Remember that you will be creating a visual resume as a part of certification. Taking photographs during the Discovery process not only prepares you for creating the Visual Resume, but also assists you in remembering what you observed. It can also be helpful to take short video clips. Please take time to ensure videos represent your Learning Partner in a respectful manner.



Visual Resume: A picture says 1,000 words! Use pictures that show your Learning Partner performing tasks. Posed pictures should be avoided (the only posed picture should be the first picture that introduces the Learning Partner). Rather, focus on pictures that will assist an employer in seeing what your Learning Partner does and helps the potential employer understand how your Learning Partner would be a good fit for their business.

Customized Plan for Employment (CPE): While the CPE is one of the last steps in the certification process, you will want to begin to prepare for it early. At the CPE, you want to include anyone who is important to your Learning Partner. This may include: family members, friends, neighbors, people from church or community organizations, and paid staff. Begin the planning process at least 2-3 weeks prior to when you want the meeting to be held. Keep in mind that everyone is busy and that you will be coordinating multiple schedules for the CPE. At the CPE, keep things moving and keep the energy positive. One of the goals of the CPE is to create a plan that will lead to a customized job for your Learning Partner. Focus on strengths. It may be rare to have someone at the CPE who does not believe your Learning Partner can go to work, but it does happen at times. You want to keep control of the meeting by helping everyone understand that you are going to review the information learned in Discovery and together create a plan that will lead to work.

Self-learning: You are assigned a Mentor for this process who will help keep you on track. Your Mentor will establish timelines and due dates for assignments. It is up to you to stay focused and make sure you complete your work on time. Adult learning can be challenging if you don't prepare yourself and remain organized. Your Mentor isn't responsible for reminding you of deadlines and following up to ensure your work is completed. Most Mentors, however will check in to see how you are doing.

Quality: It is important for MG&A to maintain the integrity of the Discovery process. Candidates successfully completing certification have produced a quality and comprehensive Profile. Certification is based on a combination of completing all required tasks as well as quality content contained in the profile. Certification is not obtained solely by completing the required steps of Discovery. Your Mentor will make all attempts possible to assist you in understanding the Discovery process and capturing information in a well-organized descriptive and meaningful manner. The completed Profile, Customized Plan for Employment and Visual Resume are all professional documents that will hopefully be read by friends, supporters and funders, such as rehabilitation counselors. It is vital that the writing be professional. Your Mentor will be guiding you in this area. If you know your writing skills are not strong, partner with someone who does have strong writing skills and have them check your writing.



Translation: Everything that we learn in Discovery is an act of translation. As you write descriptively, you want to keep in mind how the information you capture will translate in other sections of the Profile as well as in the potential workplace. Keep in mind this is why we want to ensure that we capture what our observations “look like” as this will provide the information needed to translate what it may look like in the world of work.

Communication: Respond to emails and participate in conference calls. You should always feel comfortable talking to your Mentor about any issue that is impacting your progress, such as, confusion over content, illness, etc. Mentors are there to support and guide you.



Discovery Certification Task List

Requirement	Targeted Completion Date	Actual Completion date
Identify Learning Partner		
Sign Discovery Signature Page and send your Mentor		
Sign the Agreement to use MG&A Webinar Series to view MG&A webinars and email marcgoldassociates@gmail.com or fax (228-205-4597)		
Read all 3 Discovery Series Manuals		
Watch all webinars – This will take approximately 8.5 hours to watch them all		
Schedule initial meeting with your Learning Partner		
Submit a descriptive summary of your initial meeting with Learning Partner, if requested by your Mentor and review with Mentor		
Submit draft of Profile Part 1		
Review edits with Mentor		
Submit Part 1 with recommended edits made		
Submit discovery notes to Mentor		
Submit drafts Profile Part 2 one section at a time and Discovery Activity Log completed to date		
Review edits with Mentor		
Submit Part 2 with recommended edits made		
Receive approval of completed Part 2 and permission to begin Part 3		
Submit draft of Profile Part 3		
Review edits with Mentor		
Submit Part 3 with recommended edits made		
Begin contacting people to schedule the CPE		



Requirement	Targeted Completion Date	Actual Completion date
Conduct CPE: remember to video meeting		
Submit CPE worksheet and video to Mentor		
Complete edits and submit CPE worksheet to Mentor		
Complete Visual Resume		
Submit to Mentor for editing		
Submit Visual Resume with recommended edits made		
Update Activity Log and submit to Mentor		
Complete test with 70% accuracy		
Submit final email with all approved sections of the Profile, CPE meeting worksheet, Visual Resume, Test, and Discovery Activity Log		
Final Completion Date for Certification		



Discovery During COVID:

Remember, within Discovery, we want to learn. We want to see what someone is doing and then we want to translate that into what it could mean in the world of work. We are always looking for Conditions, Interests, and Contributions. Pull out Facts, Knowledge, Skills from various home activities that you see, even if you see them virtually.

Home and Family:

1. Ask your learning partner to take you on a tour of their home (facetime/zoom)
2. Show me your favorite room in your house and tell me why it is your favorite.
3. Show me your favorite piece of art and tell me why.
4. Who do you spend time with at home?
5. Do you have pets? Tell me their story. How do you care for them? Do you share that care with others?
6. Can you introduce me to your family or the people you live with?
7. What part of your home are you responsible for? What do you do? How do you do it?
8. What devices do you use? Tell me about them.

Activities:

1. Can we make and eat lunch together? (you both do this through zoom – just sit the laptop where you can see it while you make lunch)
2. When we are able, what are safe activities we can do?

COVID Changes:

1. How are you getting connected to people during COVID?
2. How are you monitoring your health?
3. What other activities are you engaging in? How are you doing that while staying socially distant?
4. How are these holidays in 2020 different from previous years?
5. How are things different due to COVID?
6. Are you getting regular testing? How? When? Etc.
7. What are you looking forward to getting back to doing?

Education:

1. How do you coordinate? Are you involved in training or any virtual social group?
2. If you are in school, where do you do schoolwork from home? Can you show me?
3. Watch some videos of job interest areas. (in discussing interests – YouTube areas of interest and watch together)
4. Go grocery shopping/virtual Target run etc. (could be for curbside pickup or for delivery)

Feeling/Personal

1. What are things you do not like to do? And why?
2. Tell me about your typical day?
3. Tell me about your day today, how are you?



4. What are things you used to do, have you found a way to do them still? Example: If they play a video game, what are the exact steps they do to turn on the game, start it, coordinate with online friends etc....
5. Is there anything you dread going back to? Any changes that may last for you?
6. What do you most look forward to each day?

Holidays and Family Traditions

1. What winter holidays do you celebrate?
2. Can I jump in on a Zoom holiday event? (possibly a family event to see interaction with other family outside the home)
3. Are you decorating for the holidays? What do you do? Who taught you? Who decides what goes where?
4. Do you have any family traditions?
5. Show me or tell me about decorating for the holidays. (What holidays do you decorate for? Do you decorate inside/outside? What do you do and what do other members of your household do? Show me or tell me about your favorite decorations. Engage in follow-up conversation.... i.e., where did you get the decorations? Who had the biggest pumpkin? What is your favorite heart shaped candy at Valentine's Day? Favorite Hanukkah or Christmas decoration? Show me if you can.