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# Research BRIEF

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## Expanding Integrated Employment: Early Lessons From Scaling Up Pathways To Careers

The SourceAmerica Pathways to Careers® (Pathways) program supports the goals of the Employment First movement by helping people with intellectual or developmental disabilities and people with autism spectrum disorder find competitive integrated employment aligned with their skills, interests, strengths, and abilities.<sup>1</sup> SourceAmerica launched the Pathways demonstration in 2012, starting with the pilot site implemented by the Pioneer Adult Rehabilitation Center (PARC) in Clearfield, Utah.<sup>2</sup> In 2015, Pathways expanded to three other pilot sites, which we refer to as expansion sites, with new implementation partners. SourceAmerica is implementing another expansion of Pathways in 2018 and 2019 with the goal of replicating Pathways at additional sites. SourceAmerica's funding provided to the demonstration sites augments the money provided for services from the state vocational rehabilitation (VR) agency, developmental disabilities agency, and Medicaid.

This brief examines the early implementation experiences of the three Pathways expansion sites that launched in 2015. Specifically, we focus on the sites' experiences related to replicating, implementing, and sustaining the Pathways model since they launched services in 2015. As SourceAmerica scales up its expansion, understanding these experiences can inform efforts to implement Pathways in new program contexts and geographic areas. The findings presented in the remainder of this brief are largely based on two sources: qualitative data collected from our in-person site visits with each implementation partner in July 2018 and programmatic information we received from Pathways program managers. (For more information on the methods and data sources used in this brief, see the Data and Methods text box on page 15.)

### PATHWAYS EXPANSION SITES

In 2014, SourceAmerica awarded grants to three implementation partners in different regions of the country to implement Pathways as part of the pilot demonstration: WORK Inc., in Boston, Massachusetts; ServiceSource Inc. in Oakton, Virginia; and JVS Human Services in Detroit, Michigan. Each agency differs in their program objective, their internal capacity to provide services, and the extent to which they are connected to employment service agencies and referral sources (Table 1).

This brief was prepared for SourceAmerica by Mathematica Policy Research, under contract number INST-200901. The brief was submitted to Therese Fimian and Brian DeAtley of SourceAmerica. The opinions and conclusions expressed are solely those of the authors and should not be attributed to SourceAmerica. The authors would like to thank the Pathways staff in Boston, MA; Detroit, MI; Clearfield, UT; and Oakton, VA for their time and assistance throughout this study.

APRIL 2019

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**Table 1. Characteristics of Pathways expansion sites**

Site characteristics	Boston, MA 	Detroit, MI 	Oakton, VA 
<b>Nonprofit organization</b>	WORK Inc.	JVS Human Services	ServiceSource Inc.
Program objective	Provide the skills and supportive services needed to help people with disabilities achieve their career goals.	Provide counseling, training, and supportive services for people with disabilities, job seekers, seniors and others in need.	Facilitate services and partnerships to support people with disabilities, their families, their caregivers, and community members in order to build more inclusive communities.
Service area	Greater Boston	Greater Detroit	Northern Virginia region
Number of Pathways staff (FTE)	4	4.3 <sup>a</sup>	4
Examples of non-Pathways service offerings	<ul style="list-style-type: none"> <li>• Day habilitation services</li> <li>• Employment support services</li> <li>• Residential services</li> <li>• Family support services</li> <li>• Commercial facilities maintenance services</li> </ul>	<ul style="list-style-type: none"> <li>• Vocational services</li> <li>• Transition services</li> <li>• Nonvocational support services</li> </ul>	<ul style="list-style-type: none"> <li>• Transition services</li> <li>• Group supported employment</li> <li>• Drop-in career center</li> <li>• Assistive technology screenings</li> </ul>
Participation in other national programs			
• AbilityOne	Yes	Yes	Yes
• Ticket to Work	Yes	Yes	Yes
Organizations partnering with Pathways			
• VR	Yes	Yes	Yes
• Other	<ul style="list-style-type: none"> <li>• Department of Developmental Services</li> <li>• Local group of parents of people with developmental disabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Community mental health agencies</li> </ul>	<ul style="list-style-type: none"> <li>• ServiceSource Autism Services</li> <li>• ServiceSource Adult Day Services</li> <li>• SkillSource Group/Virginia Workforce Centers</li> <li>• Community Services Board</li> </ul>

Sources: Interviews with expansion site staff; <https://www.jvshumanservices.org>; <https://www.servicesource.org>; and <https://www.workinc.org>.

Note: ServiceSource has regional offices in Delaware, Florida, North Carolina, and Virginia, and it serves people with disabilities who live in those states as well as in Pennsylvania, Kentucky, DC, Maryland, Colorado, Missouri, and Texas. ServiceSource implements Pathways at its Virginia office.

<sup>a</sup>This number reflects the typical number of staff (FTE) dedicated to Pathways at JVS. Generally, all Pathways staff except the program manager are dedicated exclusively to the Pathways program. At the time of our site visit, one career navigator recently began spending one-quarter of the work week on non-Pathways activities.

FTE = Full-time equivalent; VR = vocational rehabilitation.

### About the SourceAmerica Pathways to Careers® Program

SourceAmerica developed the Pathways to Careers service approach in consultation with Marc Gold & Associates (MG&A) and contracted with Mathematica to comprehensively evaluate the program. MG&A and SourceAmerica staff trained Pathways site staff on the key service components and provided technical assistance after the program launched.

Descriptions of the five service components are as follows:

- Discovery and a career plan:** Discovery is conducted to understand the strengths of a Pathways participant and to reveal each person's job-related interests, skills, and conditions for employment success. To identify a participant's ideal work conditions, Pathways staff members talk with the person and with people who know him or her best. Staff also observe the participant in familiar and new settings, including in his or her home and community, over 10 to 15 Discovery sessions. Discovery culminates in a career-planning meeting to identify the criteria for the ideal paid internship or customized job match to guide customized internship or customized job development. Pathways staff also coordinate access to benefits counseling so that participants can understand how an internship or job will affect their benefits and eligibility.
- Employer engagement, customized internship, and job development:** Participants can opt for a paid internship or move directly into customized employment. Some participants, particularly those with a work history, often prefer to directly enter employment following Discovery. Pathways staff identify, research, and conduct outreach to employers in the community, covering a diverse array of business lines, locations, and company sizes, to offer customized internship and employment opportunities to participants. Staff also conduct direct internship and job development for participants if their career plan does not match with any employer partners.
- Expanded Discovery and paid internships:** Participants can experience one or more 8- to 12-week paid internships. If a participant chooses an internship as part of their career-planning process, it enables staff to affirm or expand on what they learned about the participants during Discovery to further identify each participant's job-related interests and ideal conditions for success. The internships also enable participants to try different job responsibilities, determine whether a job is suitable for them, and develop a greater experience base from which to make decisions about employment. During the internship, Pathways—rather than the employer—provides the salary and fringe benefits. At the end of the internship, if a participant receives a job offer, he or she can take the job or consider another internship or employment option.
- Integrated and naturally referenced employment supports and a career support plan:** During an internship or in employment, employers and participants can receive training facilitation, job coaching, and other supports from Pathways staff to enhance the natural training and supports that employers provide in the workplace. These services are meant to increase employers' participation and reduce the need for outside employment supports. Staff develop a career support plan for each participant based on the employment supports identified through Discovery and Expanded Discovery and during work experiences.
- Post-employment career support:** Pathways staff provide additional career support after a participant accepts a job offer. Staff help address concerns that the participant or employer may have about the participant's success in the job. If funding is available, staff work with participants and employers to identify training, professional development, educational opportunities, and mentors who will support the participant's career development.

The Pathways staffing model is consistent across all demonstration sites. At each site, the Pathways team includes the following:

- A **Pathways manager**, who oversees site operations, supervises Pathways staff, supports other staff in their respective roles, and often secures outside funding.
- One or more **career navigators**, who enroll participants and facilitate the Discovery and planning activities with participants and their families.
- One or more **employment facilitators**, who provide job training and on-site support for the participant and the employer and collect internship information essential to the Expanded Discovery process.
- One or more **employer liaisons**, who research and contact employers to introduce Pathways and the services it offers, learn about the employers, establish partnerships with them, and conduct internship and job development activities.

## PATHWAYS PARTICIPANTS AND PROGRAM OUTCOMES

From 2015 to July 31, 2018, the expansion sites served 75 Pathways participants. Pathways randomly selected participants from among all eligible applicants to ensure that the program did not serve only those applicants who were most likely to succeed in internships and employment. In general, enrolled participants were likely to be younger than 35; to have obtained at least a high school diploma, GED, or certificate of completion; and to have a self-reported primary disability of autism or intellectual disability (Table 2). The participant populations differed in some key respects across the sites. For example, participants in Boston were much less likely to live with a parent or guardian (46 percent) than participants in Detroit (100 percent) or Oakton (88 percent). Detroit participants were also younger on average (23 years) relative to their counterparts in Boston (33 years) and Oakton (30 years).

**Table 2. Participant characteristics at application, by site, as of July 31, 2018**

Participant characteristics	Boston 	Detroit 	Oakton 	
Number of Pathways participants	24	26	25	
Male (percentage)	NA	58	72	
Average age (years)	33	23	30	
<b>Highest grade completed (percentage)</b>				
	Some high school but did not complete high school or GED	8	12	16
	High school diploma, GED, or certificate of completion	63	77	64
	Some college or postsecondary vocational school	17	4	20
	Other or missing	13	8	0
	<b>Living arrangement (percentage)</b>			
	With parents or guardian	46	100	88
	With roommates or unrelated others	17	0	8
	In group setting with others with disabilities	21	0	4
	Other living arrangement <sup>a</sup>	17	0	0
<b>Self-reported primary disability (percentage)</b>				
	Autism	42	19	52
	Deafness/hearing impairment	17	0	0
	Intellectual disability	21	50	24
	Other genetic disorder	4	12	8
	Other <sup>b</sup>	17	19	16

Sources: Pathways application and management information system data through July 31, 2018.

<sup>a</sup> Other living arrangements include living alone, living with a spouse or partner, living with other relatives, or any other arrangement.

<sup>b</sup> Other self-reported primary disabilities include blindness or visual impairment, cerebral palsy, epilepsy or convulsive disorder, head or brain injury, and learning disorder.

Note: Numbers may sum to more than 100 due to rounding.

GED = general education development; NA = not available.

**73**  
 Percent of participants  
 matched to an  
 internship or job

During our site visits, expansion site staff universally reported that Pathways helps people with intellectual or developmental disabilities and people with autism spectrum disorder secure meaningful paid employment. Project leaders at one site reported that Pathways has increased the number of people with significant disabilities the organization has helped to obtain a paid job each year from 2 to between 8 and 10. This feedback is supported by data on program outcomes: as of July 31, 2018, about 73 percent of participants (40 out of 55 participants) enrolled in the three expansion sites were matched to an internship or paid job (Table 3).

**Table 3. Number of Pathways participants, by program outcome and site, as of July 31, 2018**

	 Boston	 Detroit	 Oakton
Pathways participants	24	26	25
Awaiting intake/start of Discovery	3	0	0
Received Discovery services	19	26	23
Received Expanded Discovery services	14	25	21
Participated in one internship	4	9	9
Participated in two or more internships	5	2	4
Participant offered job by internship host	3	2	2
Ever employed through Pathways	7	12	5
Currently employed	4	12	1
Dropout	3	5	5

Source: Pathways MIS through July 31, 2018.

**LESSONS LEARNED ABOUT REPLICATING THE PATHWAYS MODEL**

The expansion sites represent SourceAmerica’s first attempt to implement the Pathways model beyond the PARC site in Utah. Replicating a new program in a novel environment presents several challenges, including transferring knowledge to new staff, establishing sources of funding, building a network of employer partners that can host interns and potentially hire participants, and identifying potential partner organizations. Often, success depends on the extent to which the program has clearly standardized and articulated its primary components (Bradach 2003; Paulsell et al. 2014). Even when they accomplish this task, implementing organizations frequently must balance maintaining fidelity to the model—strict adherence to the program’s core elements—with making adaptations to fit the program into a new context (Kelsey and Layzer 2014; Berkel et al. 2011). Later in this brief, we discuss expansion sites’ efforts to secure funding sources. In this section, we discuss the lessons expansion site staff learned about replicating the Pathways model in different local contexts.

**The training and technical assistance (TA) provided to expansion sites successfully introduced the Pathways model in new contexts.**

Expansion site staff received comprehensive training and TA provided by MG&A and SourceAmerica that equipped them with the knowledge and strategies required to implement Pathways services. Based on their experiences, staff were confident that the initial trainings provided a foundational understanding of Pathways, enabling them to function effectively in their roles, implement Pathways with fidelity, and launch services without the need for extensive TA. One program manager noted that the training guides and templates—such as completed examples of visual resumes and concept portfolios and protocols for determining whether a participant requires an internship before seeking a job—are particularly valuable resources, because they help staff understand how to consistently apply the concepts covered during initial training.<sup>3</sup> In fact, this respondent suggested that an organization seeking to implement Pathways could probably do so after initial training using only the step-by-step directions in the Pathways guidebook supplemented with a minimal amount of TA. In addition to the training, new Pathways organizations benefit from the experiences of staff at other sites. Staff at all three sites noted that some of the most effective training and TA opportunities enabled them to compare their experiences and work products with those of staff in other sites. For instance, one training provided a forum for employer liaisons to present their completed concept portfolios and receive feedback from their peers at other sites. Each presentation generated numerous suggested improvements that employer liaisons incorporated into their portfolios following the training. In other cases, more seasoned staff provided peer-to-peer mentorship to newer staff at other sites; a staff member in the Boston site identified a career navigator in the Detroit site as a particularly strong resource for staff seeking advice or guidance.



“If you go through [the initial] training and get your hands on the Pathways guidebook, and you...take the time to figure how that will work best with your staffing structure...you can launch [Pathways] in your community without a whole lot of technical assistance.”

— Program manager

**Organizations that implement the Pathways model should carefully adapt their approach to fit the dynamics of their location and participant population.**

Staff implementing Pathways at a new organization might discover that certain aspects of the model require minor adjustments to suit the local context in their service area. For example, many participants at the Detroit site were limited to internships or jobs within a close distance from their homes because they lacked access to reliable public transportation and paratransit options. In response, Detroit recruited employers that were near participants’ homes and offered internships that closely matched participants’ interests.

Pathways staff might need to develop creative service delivery approaches for participants who require more intensive support to secure and maintain competitive employment (we describe three innovations to reduce participants’ anxiety about working on page 7). For example, expansion staff tailored their communication strategies to the strengths and needs of each participant and workplace. One respondent at the Boston site told us that she “created scripts, guides, anything that I can give the employer or staff, [and] sometimes the participant, to support them in the position...for example, photo guides [with] pictorial icons that [deaf participants] can refer to and use to communicate with staff.” In another case, the respondent converted a written menu into a guide with visual icons to help a participant prepare lunch and snacks at her job in a kitchen. Similarly, in Detroit and Oakton, staff observed that some participants required reminders about job tasks in the workplace. To address this need, staff developed visual checklists about participants’ specific job tasks that they could reference as an on-the-job resource.

Furthermore, Pathways staff can tailor their approach based on the characteristics of the participant population. For example, employment facilitators might need to devote extra attention to participants with mental health conditions to support workplace behavior and task performance. One staff member suggested that mental health training for staff and additional resources (such as on-call

clinical supports) might be helpful for her Pathways program, which serves several people with mental health needs. At another site, staff provide services to both transition-age youth and older participants with previous experience working in facility-based employment settings. Participants in the latter group (and their families) were, on average, more hesitant to pursue employment and more likely to withdraw from services than younger participants, who were often eager to secure a job.

### **Innovations to reduce participants' anxiety about working**

Some participants experience anxiety about working, which can reduce the likelihood that they transition from Discovery to an internship or job. The following are three examples of innovative practices implemented by expansion sites to address this issue:

- 1. Using Discovery activities to boost the confidence of participants and minimize dropout.** Staff in Boston and Detroit reported that some participants and their families develop cold feet about working in a competitive setting when Discovery comes to a close, and they occasionally decide not to continue with Pathways. To address this issue, staff scheduled Discovery activities for these people intended to boost their confidence. For example, a participant in Detroit with a stutter who was nervous speaking around strangers expressed an interest in working at the movie theater and grocery store he frequented. To put him at ease in those settings, his career navigator took him to both workplaces to gain an understanding of typical job tasks and interact with employees. According to the career navigator, these activities helped the participant “blossom socially” to the extent that his case manager noted an improvement in his confidence.
- 2. Introducing the full Pathways team to participants early in the process to help them feel more comfortable as they transition to an internship or job.** As participants move from Discovery to the internship or job development phase of the program, they spend less time with their career navigator and more time with other staff. To make this transition as smooth as possible, the Detroit site sometimes introduces the full Pathways team to participants as Discovery is underway. During this meeting, the employment facilitator and employer liaison introduce themselves and explain their roles in Pathways. These meetings also benefit later phases of Pathways by allowing staff to learn about the participants and identify any potential areas of need for achieving workplace success, such as workplace accommodations.
- 3. Employing informal peer mentors to reduce participant anxiety about working.** In Boston, staff informally introduced a few participants to peers in the program who are successfully employed. Staff believe that peer mentors can boost participants' confidence and help them “feel as good about themselves as we do.” As of the time of our site visit, the Boston site was considering whether and how to implement an informal peer mentorship system.

Pathways staff must also account for the features of the local job market that might hinder participants in obtaining competitive employment. In the Boston area, these features include a highly competitive job market with a large pool of qualified applicants. In Detroit, unionized workplaces are commonplace and subject to strict hiring rules that often limit hiring interns or employing Pathways participants, even when the employer expresses interest. In the northern Virginia region (where the Oakton site is located), employers are accustomed to hiring unpaid interns or volunteers to meet their staffing needs and are reportedly reluctant to host a Pathways intern or entertain the possibility of permanent employment. In the next section, we describe how expansion site staff developed strategies to recruit employer partners.

**Components of the Pathways service model might be able to operate as stand-alone services.** We asked expansion site staff to reflect on their experience implementing Pathways and to provide feedback on whether the entire Pathways service model should be offered as a whole, or if certain components could be adopted as stand-alone services. Staff in Boston believed that enough demand for Discovery exists that some family members in the community expressed an interest in paying for that service privately. One program manager suggested that Discovery and employment facilitation are key components that could serve as add-ons to traditional efforts to match people

with disabilities to employment. In fact, one site already provides Discovery in place of traditional community-based assessment when asked by agencies in counties that are not eligible to refer participants to Pathways. A program manager at another site shared a different perspective, suggesting that Pathways should not be implemented as stand-alone components because “the whole program is successful as a whole and would not be if implemented piecemeal.”



“Discovery and facilitation, I see these as our bright shining lights. People have said they would privately pay for it... When I gave the talk at that parent group in [a nearby town], I had like 30 mothers waiting in line to speak to me, and . . . they [said], ‘Where have you been?!’ People really want this kind of service.”

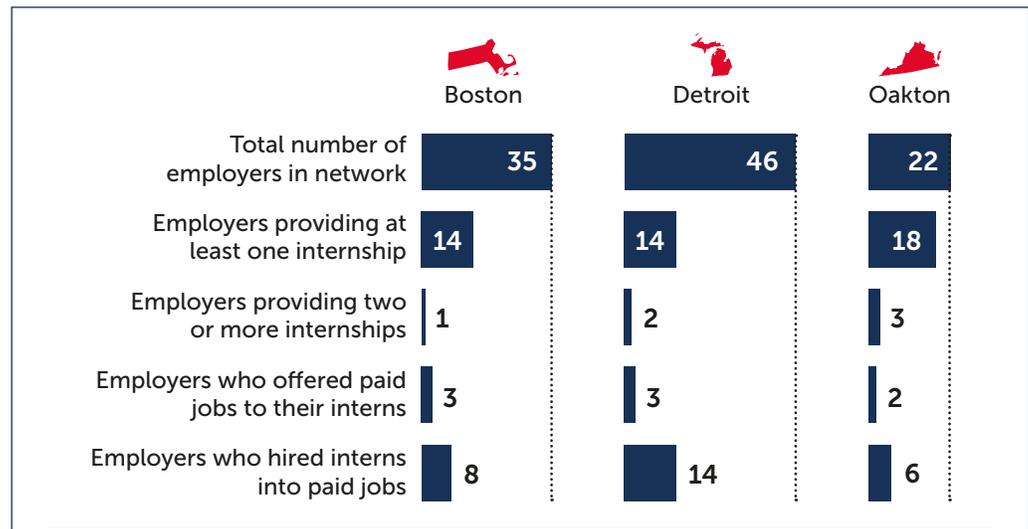
— Program manager

**103**  
Employer partners since 2015

**LESSONS LEARNED ABOUT DEVELOPING EMPLOYER NETWORKS**

Establishing relationships with employers is vital to creating appropriate internship and employment opportunities for Pathways participants. Since the expansion sites launched in 2015, Pathways staff have established partnerships with 103 total employers who made formal commitments to participate in Pathways by hosting interns and possibly offering paid jobs (Table 4). As Pathways grows from the expansion sites and into new locations, it must continue to increase its network of participating employers so that internship and employment opportunities become available for the growing number of project participants. In what follows, we discuss strategies Pathways staff have used to engage employers to partner with the program.

**Table 4. Employers participating in Pathways by site, as of July 31, 2018**



Sources: Pathways management information system and information obtained from the project directors.

Notes: We define participating employers as those that signed a memorandum of understanding with Pathways or offered an internship or job to Pathways participants. Not all participating employers had provided internships as of July 31, 2018.

**Pathways staff leverage their personal networks to identify potential employer partners.** As expected, employers were reportedly more likely to become a Pathways partner when approached through a personal connection than through other methods, such as reaching out via a telephone contact, searching for prospects in the help wanted ads, and establishing connections via the Chamber of Commerce. Although employer liaisons primarily develop employer networks, the expansion sites relied on the personal networks of all Pathways staff to generate job leads for participants. For example, all staff in Detroit are expected to inform the employer liaison of any

promising employer partners, such as businesses run by friends of friends that might be open to Pathways. The expansion sites often leverage their organization's boards to connect participants to suitable employers. These boards are made up of prominent professionals who are leaders in their organizations and communities. By using this resource, sites have been able to partner with several employers that they would otherwise not have had access to. For example, leaders at WORK Inc. presented before the board, which generated excitement about Pathways and resulted in several connections, at least three of which resulted in participants securing an internship or paid job. Pathways staff at the Detroit site attend every third board meeting to stay engaged and identify potential job leads. Many job leads also arise at career planning meetings, in which participants' families often act as good sources of referrals. For instance, the father of a participant at the Oakton site made a connection to a large national association that resulted in a participant obtaining a paid job at the association's headquarters. In another case, the family friend of a participant is considering hosting a Pathways intern at a parking garage he manages. Because the career planning meetings can generate new possibilities, staff at two sites said that they are careful to avoid "doing too much [preparation] before the meeting [because it] hampers the organic collaboration process."



"[The whole team] is of the mindset that the employer development role is everyone's job."

— Program manager

**Pathways staff strategically approach employers that are more likely to engage with the program.** According to two employer liaisons, local, family-owned, and small-to-mid-size businesses are more receptive to Pathways and usually have less bureaucratic hiring practices. With larger businesses, staff must navigate many layers of leadership to connect with the person who can authorize hosting a Pathways internship. In such circumstances, Pathways staff are reportedly redirected to different people in the company who often state they don't have staffing needs or otherwise fail to respond.

Staff are more successful when they speak with a business's decision maker who has a personal connection to someone with a disability. Often, these people are more likely to understand and actively support the goals of the Pathways program. Staff from two sites said they also achieved success by looking for organizations with a mission or specific initiatives that align with those of Pathways. To do so, staff research online to learn about local businesses that support charities or causes for people with disabilities. According to Detroit staff, a Facebook page about a business's involvement in a 5k run to support autism awareness could signal a willingness to partner with Pathways. When researching prospective employers, the Oakton site identified businesses whose corporate mission appears to align with Pathways by researching the top 50 disability-friendly companies in the area. The Oakton site also strategically approached the Fairfax County government because of its stated aim to increase diversity in its workforce and its past support for community-based initiatives, such as Pathways. For these employers, Pathways represents an opportunity to develop brand loyalty in the community with a give-back identity.

**Pathways staff carefully hone their message to potential employers to facilitate recruitment.** Although some employers are eager to work with Pathways, others want to learn more about the program before committing to a partnership. In fact, because employer recruitment requires staff to pitch Pathways to area businesses, one program manager hired an employer liaison in part because of his background in sales. Employer liaisons at all three expansion sites have refined the following messaging over time to convince employers that Pathways is right for them:

- **Stress the business case for hosting an intern or hiring a participant.** Staff at all three sites convey to interested employers that participants are dedicated workers and have the skills and enthusiasm needed for the job. By partnering with Pathways, businesses might be able to fill a need with a valued employee. For instance, a participant at the Detroit site who liked to cook got a job doing food preparation at a restaurant, where she reportedly thrives in her role and outperforms some of her coworkers.

- **Inform employers about how Pathways supports participants in the workplace.**

Pathways staff from the three expansion sites report that some employers initially express concerns about work quality and productivity if they were to hire a participant. Employer liaisons address these concerns by describing the wraparound supports Pathways provides to participants on the job. For example, staff at the Oakton site offer a presentation that describes how the employment facilitator will train the trainer at the business on the individualized ways Pathways participants learn best, proactively address any workplace concerns, and grow the professional relationships between the participant and his or her coworkers.

- **Ease concerns that Pathways might not be compatible with a particular business model.**

On occasion, an employer is receptive to Pathways but unsure whether the customized strategies Pathways uses can succeed in the employer's setting. For example, a number of potential employer partners told the employer liaison in Oakton that all employees must be able to meet a standard of success, such as meeting daily production goals. To address these concerns, staff in Oakton began setting up meet and greets with potential employers and participants who are looking for internships. The meet and greets enable employers to observe how a participant interacts with staff and customers on the job and also enables Pathways staff to determine whether the work setting is a suitable fit for the participant.



"I let [the employer] know that we provide support. We're not trying to just place a person there. We will always be there to give guidance, not only to the employee but to the employer also."

— Employer liaison

## LESSONS LEARNED ABOUT SUSTAINING THE PATHWAYS MODEL

When the expansion sites launched in 2015, much of the funding came from SourceAmerica to cover crucial start-up activities, such as developing programs, hiring, and conducting initial training of Pathways staff. SourceAmerica also provides certification and technical support to staff to support ongoing implementation of Pathways, funds participants' internship wages and other direct costs for staffing, and supports expansion site advocacy and outreach efforts by providing guidance and helping the sites identify opportunities to inform and advance state policies.

The long-term objective of Pathways is to use customized employment and supported employment best practices to match participants with integrated employment opportunities to support the goals of Employment First. A secondary goal is for each Pathways site to identify new sources of funding to sustain service delivery on a long-term basis to effect broader system change, as SourceAmerica grants are time limited. Several funding streams support people with disabilities in achieving their employment goals. Employment services and supports are primarily provided by state VR agencies, state developmental disability agencies, Medicaid home and community-based service (HCBS) waiver programs, and state mental health agencies. Often, state mental health agencies offer employment services through a network of community rehabilitation partners, such as those featured in this brief. VR agencies provide time-limited job placement support to help eligible people with disabilities secure employment. Longer-term employment services and supports for people with intellectual or developmental disabilities are most often provided by state developmental disability agencies and through Medicaid HCBS waivers that provide long-term services and supports, such as day habilitation services, which might include prevocational services, supported employment, and career planning services. Establishing partnerships with these and other entities to secure funding to sustain ongoing delivery of Pathways services will enable each site to scale-up services to support growth in enrollment and spur broader system change by boosting integrated employment outcomes in each site's catchment area.

Existing research points to several characteristics of high-performing state employment service systems, including the ability to effectively braid multiple funding sources to integrate delivery of employment services (Nord et al. 2013).<sup>4</sup> Braided funding is when multiple sources of financial

assistance are coordinated to support a single initiative or strategy (Association of Government Accounts 2014). At the Utah site, which launched three years before the expansion sites began serving participants, Pathways leadership pursued private, federal, and state sources of funding to support program operations and ongoing service delivery. The funding streams come from the state VR agency, the state 1915(c) Medicaid HCBS waiver for people with an intellectual disability or related conditions, and a private foundation board. PARC is also an employment network under the Social Security Administration's Ticket to Work program.<sup>5</sup> As an employment network, PARC receives Ticket to Work milestone payments from Social Security and bonuses paid by Social Security when participants with significant disabilities achieve specific employment outcomes. Although the previously mentioned programs have varying goals, priorities, and target populations, and operate within different funding authorities, they are all invested in the mission to expand employment opportunities for people with disabilities. Over time, Pathways leaders at the Utah site opened a line of communication about Pathways with each state agency and then effectively wove together a braided funding strategy from these sources to support implementation of Pathways services. The infusion of outside funds mostly cover internship and job development, but they also cover supports provided to participants after they secure employment (for more details on the reimbursements received by Pathways in Utah, see Appendix Table A.1).

Compared with the Utah Pathways site, the expansion sites that launched service delivery in 2015 are at an earlier stage of program maturation. Like their Utah counterparts, Pathways leaders in the expansion sites are also pursuing outside sources of funding to sustain program operations and services for the long term. By the time we visited, leaders at each expansion site had achieved some success in identifying and leveraging new funding streams to offset the cost of Pathways services, which contribute up to 65 percent of total Pathways funding (see Table 5 and the text box that follows for more on funding secured by the expansion sites). Here, we describe lessons learned about efforts to secure funding to sustain the Pathways model over time.

### Funding strategies implemented to sustain Pathways

**Boston.** The Boston site secured grant dollars from the Bayer Foundation to cover internship wages for some participants with mental health conditions. For other participants, the site established an arrangement with the state VR agency to receive funding for Discovery and Expanded Discovery, customized job development, and employment facilitation provided to those Pathways participants who are enrolled to receive VR services.<sup>6</sup>

**Detroit.** The Detroit site secured three types of funding to offset program operations. First, it obtained time-limited grants from two foundations to support participants' internship wages. Second, the Detroit site receives Medicaid waiver funding for Pathways participants from Oakland County who receive long-term waiver supports after they have been employed for 90 days. Third, the site entered into an interagency outcome-based arrangement between Oakland County's Community Health Network (CHN) and the state VR agency, Michigan Rehabilitation Services, so that people with significant disabilities could be referred for Pathways services. The Detroit site was one of three agencies chosen by CHN to implement customized employment, because CHN administrators view Pathways as a promising model to move people with significant disabilities into competitive jobs. The site worked with the U.S. Department of Labor's Office of Disability Employment Policy to help establish a fee schedule between the Detroit site, Michigan Rehabilitation Services, and community mental health agencies. The fee schedule supports Discovery; profile development; matching participants with an internship, an employment opportunity, or both; and employment supports.

**Oakton.** The Oakton site received two grants from area businesses to cover participants' internship wages. The state VR agency reimburses the site for Discovery, profile development, job development, job coaching, and follow-along services for Pathways participants; the state VR agency reimburses the latter three services in conjunction with the state Community Services Board. According to project leadership in Oakton, the VR agency is the primary payer of vocational services and supports, and the agency is critical to sustaining Pathways service delivery for the long term.

**Table 5. Previous, current, and planned sources of Pathways funding by site, as of July 31, 2018**

Reimbursed service	Reimbursed amount	Source	Notes
<b>Boston</b>			
Discovery process and profile development	\$160/\$642	State VR agency	Upon initiation/completion of services.
Internship	\$875/\$1,355	State VR agency	Upon initiation/completion of services.
Internship wages	\$96,000	Foundation grant	For the period covering 2014 to 2016. For participants with a documented secondary mental health diagnosis.
Employment development	\$1,821/\$2,731	State VR agency	Upon initiation/completion of services.
Employment facilitation	\$650/\$976 \$37.20 per hour	State VR agency	Upon initiation/completion of services. Ongoing supports (if required).
<b>Detroit</b>			
Discovery process and profile development	\$1,600	State VR agency	Completed within 60 days from service start date. For participants from Macomb, Oakland, and Wayne counties.
Internship development	\$500	State VR agency	Upon securing internship. For participants from Oakland County.
Internship milestone	\$1,000	State VR agency	Upon completion of at least 24 hours in internship. For participants from Oakland County.
Internship wages	Stipend commensurate with minimum wage, hours worked, and employer payroll costs	State VR agency	Upon completion of internship. For participants from Oakland County.
	\$10,000	Foundation grant	For the period covering October 28, 2015 to November 30, 2016.
Employment milestone	\$1,000/\$1,200/\$1,400	State VR agency	Upon completing one, two, and three months employment with an average of 12 or more hours of work per week. For participants from Oakland County.
	\$600		Upon securing employment and at 30 and 90 days employment. For participants from Macomb and Wayne counties.
Employment	\$16.83/\$24.31/\$31.79 per hour	Medicaid waiver <sup>a</sup>	For first 11 months of employment. Participants with developmental disabilities eligible upon completion of at least 90 days of employment. Rates vary by acuity of disability. For participants from Oakland County.
	\$9.35/\$16.83/\$26.18 per hour		For months 12 to 24 of employment. Participants with developmental disabilities eligible upon completion of at least 90 days of employment. Rates vary by acuity of disability. For participants from Oakland County.
	\$5.61/\$13.09/\$22.44 per hour		For months 25 and on of employment. Participants with developmental disabilities eligible upon completion of at least 90 days of employment. Rates vary by acuity of disability. For participants from Oakland County.
Employment facilitation	\$50 per hour	State VR agency	For job coaching. For participants from Oakland County.
Other	\$50 per hour	State VR agency	For job analysis and training. For participants from Macomb and Oakland counties.
	\$50 per hour	State VR agency	For job coaching. For participants from Oakland County.
	\$36,000	Foundation grant	For Employer Payroll Tax Adjustment and retention staffing for the period covering October 1, 2016 to September 30, 2017.

Reimbursed service	Reimbursed amount	Source	Notes
<b>Oakton</b>			
Discovery process and profile development	\$2,500	State VR agency	Upon completion of services.
Internship wages	\$10,000	Safeway	For the period covering Fall 2018 to Fall 2019
	\$5,000 per year	Wells Fargo	For the period covering October 2017 to September 2019.
Employment development	\$78.70 per hour	State VR agency and Community Services Board	
Employment facilitation	\$78.80 per hour	State VR agency and Community Services Board	
Employment	\$78.80 per hour	State VR agency and Community Services Board	For follow-along services.
Other	\$75,000	ServiceSource Foundation grant	Pathways applies on an annual basis for funding from the ServiceSource Foundation. This amount reflects the period covering July 1, 2017 to June 30, 2018.

Sources: Interviews with expansion site staff and ServiceSource Annual Report 2017, available at <https://www.servicessource.org/2018/04/09/2017-servicessource-foundation-annual-report/>.

Note: Funding from state VR agencies are applicable only to participants enrolled with those agencies.

<sup>a</sup> Detroit expects to start billing the Medicaid waiver when it receives a pending authorization to bill for Pathways services.

VR = vocational rehabilitation.

**Partnerships with state and local agencies provide essential sources of long-term funding.** In each of the expansion sites, reimbursement from the state VR agency provides a critical source of funding to sustain Pathways services, representing the majority of non-SourceAmerica funding. These reimbursements most commonly take the form of milestone payments (such as payments upon a participant’s completion of 30, 60, or 90 days of employment) or hourly payments for specific services provided by Pathways staff (Table 5). For example, the Detroit site entered into an interagency outcome-based arrangement between the Macomb County and Oakland County CHNs and the state VR agency to reimburse the site for job analysis and job coaching services, in addition to milestone payments when participants complete 30, 60, and 90 days of employment.<sup>7</sup>

Following the 2014 passage of the Workforce Innovation and Opportunity Act, many VR agencies are exploring ways to offer customized employment services to their clients. Pathways provides a replicable model that VR agencies can adapt to complement their job placement strategies.<sup>8</sup> For example, VR agencies in Michigan and Virginia are interested in reorienting services toward customized employment and partnered with JVS Human Services and ServiceSource, respectively, to provide Pathways services to enrolled VR clients as a new avenue to help people with disabilities secure paid employment. In Boston, Pathways staff anticipate working with the VR agency to finalize a new, customized employment-focused reimbursement schedule in the near future. When funding from SourceAmerica expires, these arrangements are likely to constitute the bulk of the funds for Pathways services.

**Nongovernmental and federal sources of outside funding are important but do not represent long-term solutions.** Overall, securing outside grants has improved Pathways sites’ ability to fund internship wages during Expanded Discovery, but the funding is time limited. When we visited the sites, only Oakton was accessing grant funding for internship wages. Oakton also receives Pathways funding from a ServiceSource Foundation grant that requires annual reapplication.<sup>9</sup> Previously, the Boston and Detroit sites obtained grant funding to pay for internship wages, and the Detroit site received a grant to fund quarterly payments, known as Employer Payroll Tax Adjustment payments, to employers that hire Pathways participants and retention staffing services. One program manager suggested that training Pathways site staff on obtaining foundation

grants and other funding streams would improve the long-term sustainability of the program. As of the time of our site visits, the expansion sites had not yet benefited from federal sources of funding other than VR funds.<sup>10</sup> None of the sites has received Ticket to Work payments from Social Security because no participants have received a payment by the time of our visit or because payments are captured by the state VR agency.<sup>11</sup> Similarly, none of the expansion sites have received reimbursement from a Medicaid waiver program, although Detroit expects to receive reimbursement for participants from Oakland County when it receives a pending authorization to bill for Pathways services.<sup>12</sup> Although expansion site staff relayed the importance of these funding streams to sustaining Pathways, they emphasized that these funding streams likely represent long-term supplements to partnerships with VR agencies.

**Publicizing Pathways is important for securing funding and building stakeholder support.** Staff at the Boston and Detroit sites emphasized the importance of building stakeholder and community support to generate interest about Pathways. Staff at the Boston site consider customized employment and Pathways as the program model of the future and are actively pursuing grants to achieve sustainability. As part of these efforts, the Boston site promotes Pathways

at fundraisers and via informational videos. Detroit has already capitalized on similar efforts after two additional counties began referring participants to Pathways following a success story that was highlighted at a fundraising event the site hosted. Staff also conveyed that spreading the word about Pathways is important as state agencies become more interested in funding customized employment service providers.



“From everything I’ve seen, [my organization] is very interested in the idea of Pathways and...[sees] what Pathways is doing as the future. It’s something [organizational leadership] like to wave the flag about.”

— *Employer liaison*

**Organizations implementing Pathways might consider modifying elements as they strategize for long-term sustainability of the program.** Expansion site staff expressed confidence that they will continue to offer Pathways when initial funding from SourceAmerica expires, but the precise manner in which they provide services might change. For example, one program manager predicted that the total number of staff working on Pathways would be reduced unless new funding can be secured to support the existing staff ratio. Another program manager suggested that in the future, participation in Pathways might be limited to those who are eligible for reimbursement from VR or other state agencies. In addition, modifications to the Pathways service model might help the program achieve long-term sustainability. For instance, respondents suggested possibly delivering services in a more economical manner, such as by conducting Discovery in a shorter amount of time, reducing the length of internships, increasing the percentage of participants who progress directly from Discovery to employment, or offering stand-alone services that are eligible for reimbursement (such as Discovery and employment facilitation).

## CONCLUSION

Pathways to Careers is an innovative program for helping people with significant disabilities secure competitive employment. The three Pathways expansion sites represent a first attempt to scale up the program from its pilot location and replicate the model in novel settings. The lessons described in this brief reflect the experiences of community rehabilitation providers that have implemented the service model and can inform efforts to introduce and sustain new Pathways programs in the future.

The success of the expansion sites in implementing the same program model in different service contexts suggests that Pathways is—in the words of one program manager—ready for replication. Staff from the expansion sites found that the trainings, TA, and program materials developed for Pathways enabled them to quickly grasp the model’s complex features and implement services with fidelity. But they also described the importance of tailoring the program to fit their local context by adjusting program elements to suit regional dynamics and the local job market. They would do so by innovating on established program features to better serve specific populations and refining

techniques for recruiting a broad network of employer partners that can offer internship and employment opportunities to participants.

Organizations that implement Pathways in the future will have to pursue outside sources of funding to ensure the program's long-term sustainability. For this to work well in practice, Pathways leaders must build relationships with prospective outside funders, particularly state VR agencies, that are invested in the shared goal of using customized employment to match people with significant disabilities to paid jobs. To that end, Pathways leadership should attempt to cultivate these relationships, as other sources of outside funding—such as grants from foundations—are helpful but typically modest in size and time limited. When asked to describe how they will sustain Pathways over time, expansion site staff expressed an intent to modify the service model, such as implementing stand-alone components or providing services in a more economical fashion. Although staff were unsure whether these modifications will ultimately be necessary, they were confident that they will continue to sustain Pathways in some form in the future.

### **Data and methods**

We based the findings in this issue brief primarily on qualitative data collected from semistructured interviews with key stakeholders, including Pathways program managers, career navigators, employment facilitators, employer liaisons, and participants and family members. The Pathways staff interviews focused on program context, planning, and early implementation; experiences with early service delivery; facilitators and barriers to program implementation; and strategies used to engage employers and expand networks of employer partners. Interviews with participants and family members focused on their experiences with Pathways. Specifically, the interviews were designed to answer the following research questions applicable to the issue brief:

- How has the Pathways service model been replicated in different program contexts and service environments?
- What factors facilitated successful placement of participants in customized integrated employment, and what barriers affected internship and employment outcomes at each site?
- How has each site built its network of employer partners to create customized employment opportunities for program participants? What outreach strategies were used, and what challenges were encountered when engaging employers in each locale?
- What potential sources of long-term funding could sustain Pathways services after SourceAmerica funding expires?

During the site visits, we observed participants receiving services such as a Discovery activity or internship facilitation session. Site visitors populated observational checklists to systematically document relevant details about service delivery during each period of observation. We also conducted follow-up interviews with expansion site staff to learn more about sources of funding for their Pathways programs. This issue brief synthesizes information collected from those respondents. Project administrative data presented in this report span the period from the start of project implementation through July 31, 2018.

The expansion sites implemented Pathways as pilot sites, and their experiences reflect several factors—such as randomization of participants and implementation evaluation activities—that might not be relevant to other organizations choosing to adopt the Pathways model in the future. Furthermore, future organizations could differ from the expansion sites in important respects, such as the characteristics of the participant population, available sources of funding, and conditions of the local job market.

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## ENDNOTES

<sup>1</sup> Employment First is a movement that aims to facilitate the full inclusion of people with significant disabilities in integrated job settings in the community. Under the Employment First approach, community-based integrated employment is the first option for employment services for youth and adults with significant disabilities (DOL n.d.).

<sup>2</sup> Evaluation findings from the PARC site are available at <https://www.mathematica-mpr.com/our-publications-and-findings/projects/pathways-to-careers-program-evaluation>.

<sup>3</sup> Visual resumes communicate experience, skills, and traits that are important to an employer, but they use pictures with captions to represent skills the participant can offer and show how the participant manages his or her disability in everyday settings. Concept portfolios are documents developed by employer liaisons to inform employers about the Pathways program and the benefits of becoming an employer partner.

<sup>4</sup> The characteristics of high-performing employment service systems include (1) use of flexible policies that identify employment as the preferred outcome with latitude for service providers to innovate, (2) use of flexible funding to accommodate the changing employment support needs of each person, (3) an effective weaving and braiding of multiple funding sources, (4) use of incentives to guide the service delivery system to implement integrated employment services, and (5) use of data to monitor and evaluate progress and goal attainment (Nord et al. 2013).

<sup>5</sup> Under the Ticket to Work program, the Social Security Administration provides beneficiaries with a ticket they can use to obtain VR, employment, or other support services from participating providers, called employment networks. These providers receive payments from the Social Security Administration if the beneficiaries they serve achieve specific employment outcomes.

<sup>6</sup> Under this funding arrangement, WORK Inc. receives component funding for select Pathways services that correspond to VR services (noted in parentheses) as follows: Discovery (assessment), Expanded Discovery (Job Targeted Education & Skills Training), customized job development (Job Development & Placement), and employment facilitation (Initial Supports and Ongoing Supports [if justified]).

<sup>7</sup> Before the current arrangement, the funding agreement with its state VR agency reimbursed the Detroit site \$1,600 upon completion of Discovery, \$600 upon completion of a participants' first and 30th day of employment, and \$900 upon completion of a participant's 90th day of employment. The current funding arrangement was developed with the assistance of the U.S. Department of Labor's Office of Disability Employment Policy.

<sup>8</sup> Customized employment means "competitive integrated employment, for an individual with a significant disability, that is based on an individualized determination of the strengths, needs, and interests of the individual with a significant disability, is designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer, and is carried out through flexible strategies, such as job exploration by the individual and working with an employer to facilitate placement," according to the Workforce Innovation and Opportunity Act, 2014 Amendments to the Rehab Act (H.R. 803 Section 7 (7) (29 U.S.C. 705).

<sup>9</sup> The ServiceSource Foundation supports unfunded or underfunded programs to provide services for people with disabilities. For more information, visit <https://www.servicesource.org/get-involved/giving/#AbouttheFoundation>.

<sup>10</sup> Some Pathways participants may be eligible for funding that originates from Medicaid waivers, although the funds may be distributed through state agencies, such as developmental disabilities services agencies.

<sup>11</sup> As part of its partnership agreement with JVS Human Services, Ticket to Work milestone payments for Detroit Pathways participants are captured by the Michigan VR agency. The Boston and Oakton sites expect to receive Ticket to Work milestone payments in the future.

<sup>12</sup> The Detroit site expects to start billing the Medicaid waiver in the near future for Pathways participants who have been employed for 90 days.

**Appendix Table A.1. Reimbursements received by Pathways in Utah, by funding source**

Reimbursed service	Reimbursed amount	Source	Notes
Supported employment	Ranges from \$500 to \$9,600 per participant per year	State disability services agency	Applies to participants who are enrolled in the Community Supports Waiver or are on the waiting list for waiver services who secure paid employment.  Cap limiting reimbursement of supported employment to \$2,000 was recently imposed. Participants who were previously authorized to receive services before this change are not subject to this limit.
Discovery process and profile development	\$1,500/\$2,000	State VR agency	VR covers up to \$1,000 for job supports for up to two paid internships.
Internship development	\$1,500/\$2,000	State VR agency	
Paid internship for up to two internships	\$1,000 each	State VR agency	Pathways is negotiating to receive reimbursement for job coaching provided during paid internships with an hourly rate.
Employment facilitation	\$35 per hour up to 2 years	State VR agency	Job coaching after individual is hired.
Employment milestone	\$2,000	State VR agency	Milestone payment for those who obtain paid employment.
Employment milestone	\$1,500	State VR agency	Milestone payment for those who are employed for longer than 100 days.
Employment	\$500 if conditions are met	State VR agency	Bonus payments if employer offers health benefits or certain other fringe benefits.
Phase 1 milestones	\$1,442	Social Security Ticket to Work	Upon participant meeting or exceeding earnings of \$880 per month for one month. <sup>a</sup>
	\$1,442		Upon participant meeting or exceeding earnings of \$880 per month for three months within a six-month period.
	\$1,442		Upon participant meeting or exceeding earnings of \$880 per month for six months within a 12-month period.
	\$1,442		Upon participant meeting or exceeding earnings of \$880 per month for nine months within an 18-month period.
Phase 2 milestones	\$247 per month for up to 18 months	Social Security Ticket to Work	Upon participant gross earnings exceeding substantial gainful activity amount of \$1,220 (or \$2,040 for participants who are blind).

Reimbursed service	Reimbursed amount	Source	Notes
Outcome	\$247 per month for up to 60 months	Social Security Ticket to Work	Upon participant earnings exceeding substantial gainful activity amount of \$1,220 (or \$2,040 for participants who are blind) and not receiving a monthly federal cash benefit payment.
Paid internship beyond two internships	May be available to Pathways participant	Pathways Foundation Board	Funding became available in October 2016.

Sources: Program documents and interviews conducted with Pathways staff during October 2016 site visit.

<sup>a</sup> If the participant is a VR sponsored client, VR receives the Milestone 1 payment. If the participant is not sponsored by VR, PARC receives the full Milestone 1 payment.

VR = vocational rehabilitation.

