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***Missouri Division of Developmental Disabilities***

***Employment Services Toolkit***

**Tool # 10 - *Supported Employment:* Monthly Retention Plan**

**Instructions:** After an individual begins working, use this form to regularly document their progress on the job, identification of support needs. This form is intended to align with the definition and outcomes for this service:

*Provide a monthly retention plan describing the results of the professional observation and assessment of the individual and their current and needed paid/unpaid supports to sustain employment. The retention plan includes a summary of implementation strategies to maximize employment, independence, natural supports, job performance and addressing any identified potential risk associated with reduction of paid supports.*

There are three sections to the form:

1. *Employment Support Strategies:* Identify each of the employment support strategies being used and provide a short summary for each.
2. *Social Inclusion:* Key to success in a workplace is social inclusion. This section lists standard elements of social inclusion, with room to add additional items as needed. See the Institute for Community Inclusion publication “[*Workplace Culture Assessment Tool*](https://www.thinkwork.org/sites/thinkwork.org/files/files/Workplace_Cult_%20Tool_fnl.pdf)”, for additional items and a comprehensive review of workplace culture issues to promote inclusion on the job.
3. *Job Progress Summary:* Review each of the items to provide an overall summary regarding the individual’s progress on the job.

Base the documentation on the specific standards and context of the workplace, using a combination of observation and feedback from the individual, co-workers, and supervisors. In identifying strategies for addressing issues, be sure to consider both the employer and employee’s role and feedback in addressing the issue.

Note: This tool should **not** be used as a job performance review by the Employment Specialist/Job Coach, based on their standards. Performance reviews are the responsibility of the employer.

### INDIVIDUAL:

### DMH ID:

### EMPLOYMENT SUPPORT STAFF:

### AGENCY:

### DATE OF REPORT:

**Employment Support Strategies**

Check all the employment support strategies being used. For each item checked, provide a summary/description. (For details on each of these strategies, see the [*Job Coaching Tool*s](https://www.employmentfirstmo.org/content/resources/pages/job-coaching-tools/).)

[ ]  Employer training

Summary/description:

[ ]  Co-worker assistance/support

Summary/description:

[ ]  Direct training by job coach of individual on tasks

Summary/description:

[ ]  Systematic instruction (creating a step-by-step breakdown of job tasks)

Summary/description:

[ ]  Assistive technology (including use of apps)

Summary/description:

[ ]  Reasonable accommodations

Summary/description:

[ ]  Identifying and using natural cues

Summary/description:

[ ]  Self-management techniques (schedules, checklists, picture guides, etc.)

Summary/description:

[ ]  Assisting individual to meet production goals. *(Note: This should be done only as absolutely necessary on a limited basis, as it can create significant challenges with employer expectations and fading supports.)*

Summary/description:

[ ]  Use of remote supports (video calls, phone, texting, email, etc.)

Summary/description:

[ ]  Other:

Summary/description:

[ ]  Other:

Summary/description:

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| **Social Inclusion** |
| **Directions:** Listed below are standard elements of social inclusion in the workplace. Determine if that element of social inclusion is in place (Yes/No). If the element is not applicable, note that. Add additional elements as needed. |
| **Social Inclusion Element** | **Yes/No** | **Comments** Goals, reflections, strategies for addressing |
| Interacts with co-workers |  |  |
| Initiates interactions with supervisors/co-workers |  |  |
| Communicates socially with co-workers, appropriate to workplace culture |  |  |
| Responds to interests mentioned by coworkers |  |  |
| Supervisors and co-workers initiate interactions with individual |  |  |
| Supervisors and co-workers provide directions/instruction directly to individual |  |  |
| Takes breaks/meals withco-workers |  |  |
| Participates in workplace celebrations |  |  |
| Receives orientation/training similar to co-workers |  |  |
| Receives feedback/performance reviews from supervisor |  |  |
| Attends staff/employee meetings |  |  |
| Participates in workplace committees |  |  |
| Engages in social rituals (coffee club, contributing to gifts, etc.) |  |  |
| Socializes with co-workers outside of work |  |  |
| Understands & uses workplace terms/jargon |  |  |
| Same dress/uniform asco-workers |  |  |
| Similar work schedule as other workers |  |  |
| Same break times as co-workers |  |  |
| Click or tap here to enter text. |  |  |
| Click or tap here to enter text. |  |  |
| Click or tap here to enter text. |  |  |
| Click or tap here to enter text. |  |  |

**Job Progress Summary**

* Employer satisfaction with individual’s performance:
* Individual’s satisfaction with job:
* Summary of individual’s job strengths:
* Summary of how natural supports are being utilized:
* Summary of areas for improvement and strategies to address:
* Level of job coaching currently required (% or #/hours out of total hours scheduled):
* Plan for fading (i.e., both in terms of direct assistance/intervention on the job and number of hours on the job):
* Potential risks in fading paid supports:
* Opportunities for additional career growth and learning:
* Additional notes:

Amount of time spent providing this service (including preparation, coordination, meetings, service delivery, and documentation):

Hours: Minutes: