



# HOW TO GUIDE: Client Engagement

## Introduction

Client Engagement is the first stage of the 5-stage Supported Employment process, which the European Union of Supported Employment Quality Standards describe as follows:

*“This stage probably provides the broadest range of activities, the majority of which will be unique not only to specific disability groups but may be also unique to individuals from any other disadvantaged groups”.*



Client Engagement is based on:

- Individuality
- Respect
- Accessibility
- Flexibility
- Confidentiality
- Self Determination
- Informed Choices
- Empowerment

The core values of this stage are to provide accessible information in an appropriate manner and to support the individuals to use the information and experiential learning to make informed choices. The activities in this stage must be relevant, person-centred and part of an agreed plan of action to ultimately support the individual into paid employment. It is expected that at the end of the engagement stage the individuals will make informed decisions as to whether or not they wish to use Supported Employment to find work and whether they wish to do so with that particular service provider. At this stage the terms 'client' and 'potential job seeker' are interchangeable.

The activities within the client engagement stage will vary between different target groups (school-leavers, employees of sheltered workshops, clients of day care facilities, unemployed etc) or to the disability a person experiences. Nevertheless there are some general aspects of good practice of client engagement which are described in this How To Guide.

### Why do we need good client engagement?

Good client engagement is required to ensure that a prospective job seeker is able to make an informed choice and to be confident that they will receive the service they need and clarity in what the process will entail. For this reason it is important to give clear, accurate and consistent information and to create a comfortable environment for the potential job seeker based on respect and confidentiality.

The activities of client engagement should set the standard of the Supported Employment service the job seeker will experience.

Good client engagement will break many of the conventional ways of transition by offering paid employment in the open labour market as an alternative to sheltered workshops, day care centres or to stay at home.

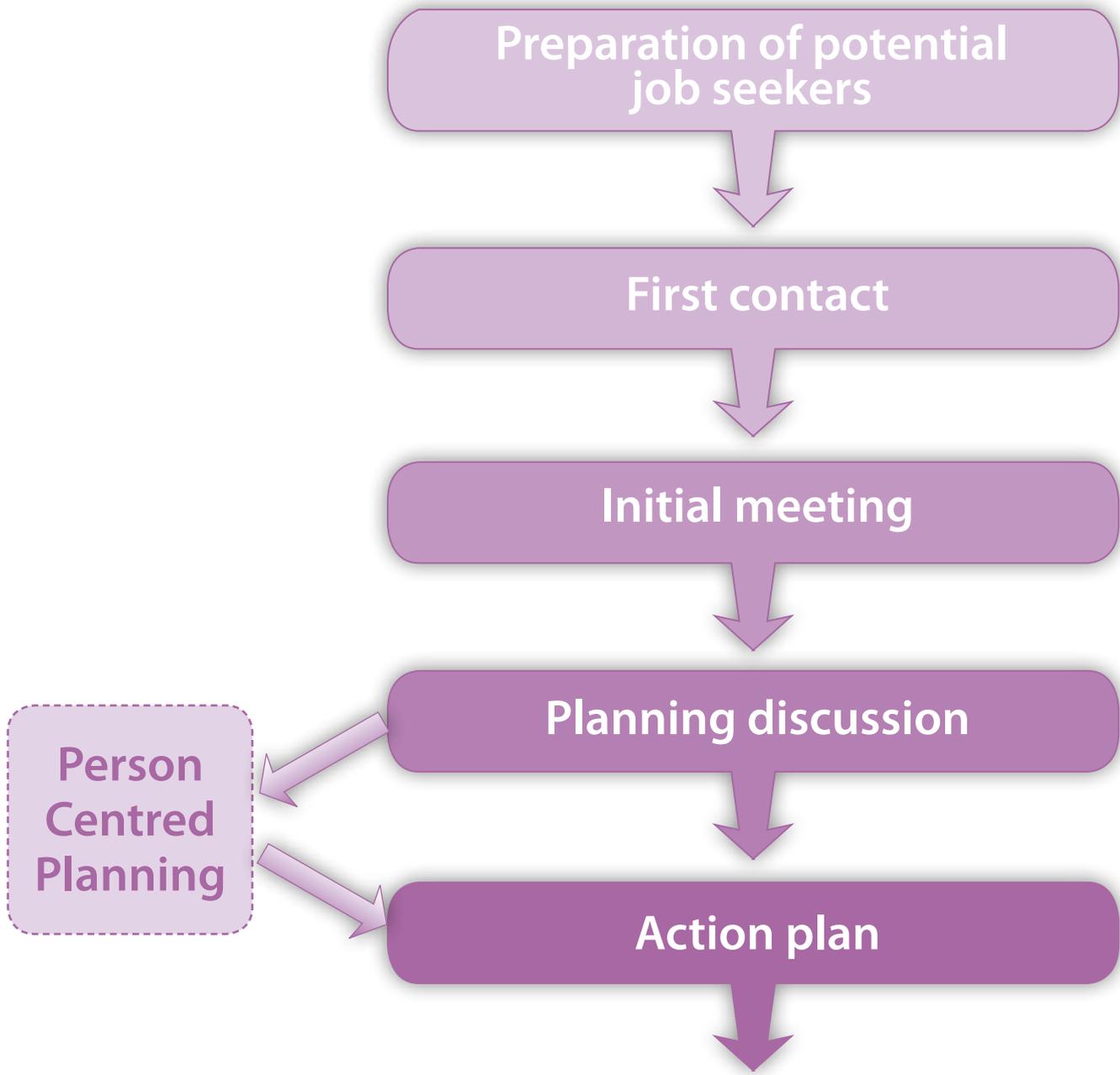
### Process of the Client Engagement Stage

This could be described as a transition process because we are prescribing the transitions from school to work, from hospital to work, from unemployment to work or from sheltered workshops or day care centres to the general labour market.

The process of vocational integration should always be individual; from the recognition or wish of the individual to find open employment, to the realisation of this. The journey from the first thought to the concrete co-operation between a job seeker and the Supported Employment service provider should reflect the client's individuality and respect for the client's wishes. This process will differ from person to person depending on their needs and experiences; on their disabilities and disadvantages and on their personal circumstances.

The 5 steps of the process of the client engagement stage described below need not necessarily be addressed in the mentioned order. Depending on the needs of the potential job seeker, the order can be changed, or some steps avoided. Also signposting to other services can be necessary at any stage depending on the needs and wishes of the job seeker.

■ STAGE 1: CLIENT ENGAGEMENT PROCESS



■ STAGE 2: VOCATIONAL PROFILING

## METHODOLOGY

### Preparation of Job Seekers

Potential job seekers have their own unique history, experiences and resources when they make contact with Supported Employment service providers. Service providers will often have had little or no influence/involvement in an individual's education or on their earlier work experiences. Ideally a Supported Employment agency should work closely with the education provider to facilitate a positive view of employment. It is recognised that individuals should be encouraged and empowered to make informed decisions and choices regarding their employment preferences. The quality of the experience will determine the co-operation between the job seeker and the service provider.

To properly manage expectations, Supported Employment service providers should provide information to educational establishments, hospitals, sheltered workshops, rehabilitation services and funders. This can be achieved through publicity leaflets and attending/hosting information events with key stakeholders. Formal and informal links should be developed locally by the Supported Employment service provider with teachers, parents, employment office, insurance offices, medical and social care professionals, disability experts and organisations of disabled people<sup>1</sup>.

### First Contact:

The first contact can be via a telephone call, mail or a job seeker visit - in any event it should be realised in the most appropriate way for the individual. The aim of the first contact should be to make the potential job seeker feels welcome and valued. At the first contact the idea is to assure the individual in any future meetings that reasonable adjustments and accommodations will be provided if required. The potential job seeker or the person making the referral should be consulted about their needs or any particular requirements for a first interview.

It is important to remember that first impressions are important and that should include the conduct, attitude and social environment of the Supported Employment service provider.

### Initial Meeting:

The initial meeting should ideally be face to face but in any event the meeting must put the client at ease and build up a level of confidence, trust and respect between the individual and the Supported Employment provider.

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<sup>1</sup> Leach, S. (2002): A Supported Employment Workbook - Individual Profiling and Job Matching. Jessica Kingsley Publishers, London and Philadelphia, p. 35ff

- *Setting up a meeting*

Social Environment: Wherever the initial meeting takes place, it should be comfortable and appropriate to the potential job seeker's needs. Ideally the client should decide the location but the room should be accessible, private and in a calm environment. Reasonable adjustments should be discussed and agreed depending on the needs of the potential job seeker.

- *Contents of the initial meeting*

The meeting should provide general information about the Supported Employment service and the level, nature and types of support that are provided. The potential job seeker should be encouraged to tell you about their wishes, preferences, expectations and concerns. The service provider should outline the Supported Employment process and ensure that the potential job seeker understands and agrees with the activities and roles involved. The meeting should establish if the individual wants to work or to find out what work is like. Where appropriate, an individual may be referred to other, more relevant services or be provided with information of alternative support services.

The quantity of information and the length of the meeting will depend on the needs of the potential job seeker. The individual should be empowered to decide whether the Supported Employment service is the appropriate service for them. The service provider should gather sufficient information to determine if they are able to provide the support that the potential job seeker needs to achieve their aims. Consent must be obtained by the Employment Support Worker to contact other stakeholders, e.g. medical professionals, welfare benefit advisers, care managers etc.

The outcome of the meeting may be limited to gathering a minimum amount of information or indeed it may achieve the agreement of the development of a concrete action plan. Once an action plan has been agreed, the process progresses to the next stage in the Supported Employment process - Vocational Profiling.

### **Planning Discussion:**

The Planning Discussion is a two-way-interaction, so that both parties give and receive information from each other. It is the responsibility of the Supported Employment service to ensure that clarity and understanding occurs.

The job seeker should be made comfortable and confident to obtain and provide as much information as they wish. The wishes and interests of the job seeker are paramount.

At conclusion the job seeker should be clear about what potential employment options they have with regards to welfare benefit advice and all aspects of employment support. It is the responsibility of the Employment Support Worker to explain clearly the form of support they can provide.

One method of a person-centred approach is “Personal Future Planning”. By using this method, individuals may plan and self-determine their vocational integration with the support of individual circles of support. The instrument of Personal Future Planning is recommendable. With this method a potential job seeker can:

- Search for their individual supporters
- Gather a circle of support
- Reflect and develop with their supporters their individual interests and wishes, strength and resources
- Make concrete action plans with steps and tasks for the involved people
- Ensure that the agreed steps will be realised.

The involvement of other stakeholders should be mentioned in the initial dialogue meeting. Involved stakeholders can include parents, teachers, friends, administrators at social insurance offices and funding offices, peer supporters and self advocacy organisations etc.

There may be stakeholders who are present from the beginning; others may be involved later on. Additional stakeholders might be necessary, e.g. new nominations by the job seeker or who professionals think are necessary. This may depend on the themes which are being addressed, e.g. independent living, money management, etc.

The Employment Support Worker should inform the job seeker about the possibilities of involving other stakeholders – the job seeker decides who will be included.

A consensual agreement form for the involvement of stakeholders can be signed, if appropriate, by the job seeker and the Employment Support Worker.

The result of the initial dialogue should be recorded and signed by both the job seeker and the Employment Support Worker.

### Action Plan:

The aim is to establish an agreed Action Plan setting out clearly defined and time bound objectives for both parties with reviews in place from the beginning. If at this

stage it was decided not to find work at this particular time, the potential job seeker should be directed to an alternative service. They should be assured that they can return to look for work when they feel ready.

The Action Plan, in effect, becomes the next stage of the Supported Employment process Vocational Profile (Stage 2)<sup>2</sup>.

The Action Plan will include the following:

- What shall be done?
- Who is responsible for the realisation of the actions?
- When will the actions be realised?
- Who will ascertain that the action was realised?

### Tips for Effective Client Engagement

This How to Guide was developed by practitioners for practitioners. Therefore the listed “Useful Tips” and “Things to Avoid” should help readers to benefit from the authors’ experience and knowledge.

#### Useful Tips:

- Make sure that the information you give is understood by the job seeker
- Make sure that you understood the information you got from the job seeker
- Offer both written and spoken information
- Use easy language
- Take your time to find out what kind of environment best fits the meeting with the job seeker
- Be aware of how signs or symbols can affect the first meeting with the job seeker
- After a meeting, always summarise what has been said or agreed. If needed, write it down and give it to the job seeker

#### Things to Avoid:

- If you meet the job seeker together with a stakeholder, do not speak as if the job seeker were not there. Remember it is the job seeker who should be in the centre of the process
- Do not speak with other stakeholders about the job seeker without including them

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<sup>2</sup> Griffin, C./Hammis, D./Geary, T. (2007): The Job Developer’s Handbook. Paul H. Brookes Publishing Co., Baltimore.

- Never ignore the wishes and interests of the job seeker
- Avoid putting your own values or prejudices on the wishes and interests of the job seeker

### Reflective Questions

The following questions are intended to initiate further discussion and should help practitioners and Employment Support Workers to reflect their methods and approaches:

- In what way can you prepare the information given to the job seeker to ensure that it is understood?
- Remember to put yourself into the position of the job seeker. If you were they, what would you like to happen?
- How do you build up trust and respect?
- How can you ensure confidentiality?
- To whom should you give information in order to make it possible for job seekers to find your service?
- What are the benefits and disadvantages of a potential job seeker being accompanied at the initial meeting?

### Relevant EUSE Position Papers:

- Values, Standards and Principles of Supported Employment
- Client Engagement
- Vocational Profile

### Relevant EUSE How To Guides:

- Vocational Profiling

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This document is available in alternative formats such as Braille, Audiotape or Electronically on request.

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Produced by the European Union of Support Employment/Leonardo Partnership  
as part of the European Supported Employment Toolkit.