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Monarch RISE:

Resources for Innovation, Skills, and Employment

Monarch RISE Project Professionals Resource Package 1: Participant Intake and Onboarding

A Toolkit for Launching Your Own Initiative for Services Professionals and Mentor Cohorts

This package is designed for non-profit organizations, agencies, or teams looking to replicate the Monarch RISE Project or to develop a similar assistive technology initiative that supports services professionals and mentors working with individuals with disabilities seeking to achieve or maintain competitive integrated employment.

The first in a five-part resource series, this kit offers a curated collection of tools used by our team during the Intake and Onboarding activities of the Monarch RISE Project Phase 1. These materials include practical templates, communications, and strategies and reflections for launching and supporting your own cohort of professionals.

Whether you're just spreading your wings or preparing to fly, this package includes:

- Planning insights and lessons learned
- Sample communications and onboarding tools
- Sample orientation agendas, presentations, and recordings
- Participant-facing media and outreach templates
- Real feedback from professionals in the field

We invite you to adapt these resources freely to meet the needs of your organization and the communities you serve. Our goal is that this toolkit helps you take flight faster – equipping you to launch with confidence, RISE to meet participant needs, and reach new heights!



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Post-Activity Report: Professionals Participant Intake – July 2, 2025

Introduction

Phase 1: Participant Intake and Onboarding of the Monarch RISE project is complete. This milestone marks the onboarding of a dynamic group of 80 professionals—experts in blindness services and blind professionals from diverse fields—who will play a pivotal role in the project. In later project activities, these professionals will learn the Monarch, prepare to mentor Phase 2 participants pursuing competitive integrated employment (CIE), and provide valuable feedback on how the Monarch and accompanying trainings can support CIE outcomes.

Phase 1: Participant Intake and Onboarding included developing and advertising a project application; reviewing and scoring applicants; notifying applicants of their selection status; securing participant agreements and intake information; conducting project orientation; and distributing Monarch devices to selected participants.

Successes

- All requisite Participant Intake and Onboarding tasks were completed prior to next Monarch RISE Project Activity (Tech Training).
- More than 220 complete applications were received.
- Representing 40 states and territories in the US, 54 experts in blindness services and 26 blind professionals from a variety of fields were selected and have since completed onboarding.
- Monarch devices were shipped to all participants; only one required replacement due to malfunction,
- All RISE staff and contractors reported high teamwork satisfaction across departments during intake activities.

Challenges

- Some applicants found particular application questions challenging to understand.
- Some applicants encountered accessibility issues with intake surveys created on SurveyMonkey. The Monarch RISE Team has moved to using Microsoft forms.
- Some prospective applicants were not clear about distinctions between Monarch RISE and other simultaneous projects involving the Monarch offered by APH.
- Staff turnover and a few internal processing issues caused minor delays in product management and some project activities.

Lessons Learned

- Use other survey solutions that can overcome possible accessibility barriers and test prior to distribution.
- Engage in purposeful outreach to underrepresented states/territories.
- Package Participant Intake Documents together as much as possible, streamlining the participant experience and eliminating the need for multiple surveys.
- Leverage the expertise of Phase 1 participants and the project's External Local Evaluator to advise on preparing for the Phase 2 application process.
- Create social media guidelines and resources for participants.



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Quotes from Monarch RISE Project Professional Participants during Participant Intake Activity

I am excited about... "Being able to engage in peer and knowledge exchange with a community of folks dedicated to positive employment outcomes of blind individuals. In addition, having the opportunity to participate in a project where we examine the effectiveness and impact of braille literacy surrounding employment and performance at work. "

– Ann, Coordinator - Disability Cultural Community Center

"I frequently hand braille notes for presentations and this will be so much easier for work. I also can't wait to share and use it to help others."

– Brianna, Vocational Rehabilitation Counselor from New Jersey

"I am excited about learning the newest technology to teach other professionals and blind college age students. Learning how to navigate a device that will change lives."

– Casey, Lead University Instructor from Louisiana

"I'm excited to be part of something that advances real access for blind users. As a legally blind TVI and parent of a blind child, I see both the gaps and the potential. This gives me a chance to help shape tools that actually meet real needs in education, rehab, and daily life."

– Garrett, Owner and TVI from Mississippi

"The most exciting thing is the doors it will open for our students. As a parent of a blind daughter and now a TVI, I believe all students can be successful when given access—and the Monarch has just opened a new door full of possibilities. Having tactile input readily available is truly exciting and will make a meaningful difference in how our students learning."

– Helen, TVI from Alaska

"I'm excited to see what new horizons using a Monarch will open for me in my professional work that I haven't even been able to imagine before because I haven't had access to the visual graphics my sighted coworkers do. In the creative side to my life, I'm looking forward to how the Monarch can change how I read and write. Finally, I'm excited to make new connections in the blindness community and to form a new community to learn from each other."

– Jameyenne, Special Counsel from Washington D.C.

"A few years ago, a friend suggested that a set of Braille maps would assist me a lot with planning trips for my clients as a travel advisor. True, I thought, But where on earth will I put them?! LOL! Now I won't have to worry about things like that, at least not in the future! This is so amazing, and I just can't thank you enough!"

– Jana, Travel Advisor from Tennessee



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I am excited for...“The ability to be able to help shape the future of accessible technology. It is such a revolutionary device, and I am so excited to have access to it not just for me as a clinician, but for others in my field as well.”

– **Jessica, Psychotherapist from New York**

“I love technology and learning about new advancements. I can’t wait to teach my students everything I learn through this project. Helping them get the most out of technology—whether for school or work—is one of my favorite parts of the job, and I’m excited to pass this knowledge on to them.”

– **Jesus, Assistive Technology Instructor from Florida**

“I am excited about the possibilities I can make available to my college student clients through the Monarch for accessing images and mathematical material. I am thrilled at the idea of demoing this device to local employers such as Intel and Nike and opening their eyes to the possible ways people who are blind can contribute to their enterprises.

And, finally, I am really looking forward to reading a book for the first time ever on a multi-line Braille display.”

– **Julie, Assistive Technology Specialist from Oregon**

“I am eager to learn how this device can benefit me and others in career readiness and options.”

– **Katie, Marketing Manager from Wisconsin**

“I am just really excited to participate in what I know will be a ground breaking study as it relates to the educational and employment implications of this AMAZING device. I am so fortunate that I will have the opportunity to use it with both young adults preparing to transition to work or college as well as adults, adjusting to vision loss who want to return to the workforce....”

– **Kerry, TSVI/COMS from Florida**

“I am excited to think about how this device can increase access to new professions for the blind.

It is also exciting to discover how a 2 dimensional display makes me think differently. about what I am reading. I am so used to thinking of my material one line at a time. on a computer even, I have to move my cursor to the information I want to review, instead of just moving my hands to the place on a page the way I did when I was reading paper in school.”

– **Manuel, Assistive Technology Specialist from Arizona**

“I’m excited to be part of the program for so many reasons; to be an early adopter of this game changing technology, to integrate it into my work to become more independent and effective as a leader in my team, to influence the future direction of the project, and to mentor others, including blind software engineers like myself, on how to accelerate their use of tactile graphics on their journeys as blind professionals.”

– **Michael, Senior Software Engineer from New York**



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"It is the top of my 46 year career to be a part of the up and coming braille technology especially with the Monarch. It is so exciting to work on the first multiline braille display and tactile graphics. When I started there was not any useable braille technology! Now I want to incorporate the advancements of the Monarch to adults who are reentering the workforce after losing vision."

– Miriam, School Educator from North Carolina

"As a STEM professional, I believe that the Monarch has the potential to be a very useful tool for me and so many others working in, or studying in, STEM professionals. I look forward to learning, providing useful feedback, and mentoring up-and-coming STEM (and other) job seekers."

– Nathanael, Supervisory Civil Engineer from Connecticut

"As an assistive technology trainer, I am particularly eager to explore the integration of maps with braille, other graphics, and other visual aids. I believe this technology holds great potential for enhancing the teaching of spatial representation of screens. I am excited to contribute to the group's endeavors and eagerly anticipate the opportunity to acquire valuable knowledge and skills."

– Paul, Assistive Technology Trainer from Colorado

"While I think it's really important that students have access to this technology, I'd like to show how it could be very useful in employment settings and by testing it out in my own work setting, I believe I could give valuable feedback to help it integrate more seamlessly for those in the workplace."

– Ronit, Senior Genetic Counselor from California

"I'm an avid braille user, and have been all my life. It excites me to know that I will be able to help participate in such an innovative vital piece of braille technology for all ages, young and old. I work with a lot of patrons, students, education professionals, rehab professionals, all, sometimes in the same day and I'm excited to show off the potential of the Monarch and how it will make such an impact. I've been a fan since I heard of the device, and had a chance to lay my hands on one. It's all I think about now and I can't wait to see what an impact it will have. If I had this tech when I was mainstreamed in public school over 40 years ago, it's staggering to know what all I could have accomplished with such a powerful tool."

– Timothy, Senior Library from Alabama

I am excited about... "Testing it from multiple perspectives! As a blind professional for ways to expand access options to things like presentations, databases and collaborative tasks (among many others); as a mentor to prospective students and a couple of current students who are blind and pursuing careers involving data analysis and STEM; and as a musician in my spare time."

– Vicky, Assistant Director – Disability Support & Assistive Technology from Washington D.C.

"Just seeing all the ways we can integrate it for life and then also to serve my blind Veterans."

– William, Blind Rehabilitation Specialist from Virginia



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Sample Monarch RISE Project Acceptance Letter

April 25, 2025

Dear Professional in the Field,

Welcome to Monarch RISE! We are thrilled to invite you to join American Printing House (APH)'s first cohort on this journey of growth, innovation, and impact.

Monarch RISE is more than just a professional project—it's a transformative opportunity to develop your skills, expand your network, and help shape the future of accessible technology and education. As a participant, you are part of a dynamic community committed to empowering individuals who are blind and low vision through groundbreaking tools like the Monarch. Your insights and contributions will not only enhance your own professional path but also pave the way for future participants, ensuring that others can rise to new challenges and opportunities.

For more than 165 years, APH has elevated the achievements of students and people who are blind or low vision by providing braille products and materials, support services, and specialized technology. We develop innovative solutions that create a gateway to lifelong successful employment, productivity, and independence, ensuring access to opportunities in a competitive digital world. By joining Monarch RISE, you are becoming part of this mission—one that values your voice, your expertise, and your work towards creating a world where everyone is welcome.

Enclosed, you'll find a snapshot document to guide you through the project, including participant information, project activity timelines, and key links. Please have your Memorandum of Understanding signed via DocuSign by May 16, 2025. Our team is here to support you every step of the way, and we encourage you to reach out with any questions or ideas.

We are excited to embark on this journey with you. Together, we will push boundaries, open new doors, and create lasting change. Welcome to the Monarch RISE Project—we can't wait to see how you rise!

Sincerely,

Erin Sigmund

Monarch RISE Project Director, American Printing House for the Blind

502.899.2128 | RISE@aph.org



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Sample Communication: Monarch RISE Project Snapshot Doc

This snapshot is your go-to guide for what's ahead—from who's in your cohort to the key activities and upcoming tasks that will launch your project participation.

Professionals Phase Participant Information

You're in seriously stellar company—this kaleidoscope (that's a term for a group of Monarchs) is rising from all over the map. Here's a sneak peek at who you'll be soaring with:

54 Professionals in the Field and 26 Blind Professionals representing 40 US States + Territories.

Of the 54 Professionals in the Field participants, approximately:

- 19 Participants working in Assistive Technology Training (or similar)
- 15 Participants working in Vocational Rehabilitation (or similar)
- 12 Participants working as TVIs (or similar)
- 8 Participants working in Higher Education (or similar)

26 Blind Professionals working in a variety of roles, including but not limited to:

- Customer service
- Engineering
- Higher education
- K-12 education
- Law and policy
- Marketing
- Medical counselling
- Mental health counselling
- Technology and accessibility



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Project Activities Snapshot

Together, we'll fly forward through seven core project activities—each one designed to help you spread your wings, build community, and rise in your work. Here's a quick overview of what to expect:

1. **Project Intake** - Getting our ducks in a row (or butterflies in a roost?) so we can track and evaluate the impact of this project.
2. **Tech Training** - Asynchronous training designed to equip you with the knowledge and skills to operate the Monarch as a stand-alone device exhibiting skills in navigating and utilizing its key features.
3. **Experience Exchanges** - Synchronous gatherings (virtual or in-person) shaped around your interests and needs. You'll explore how the Monarch fits into your work, co-create new ways it can support employment, and propose feature enhancements based on real-world use.
4. **Peer Power Hours** - Synchronous virtual meetups to keep our colony (that's another term for a group of Monarchs) strong! Expect a mix of technical Q&A, networking, expert talks, and space to share what's working (and what's not).
5. **Peer Mentoring Training** (Blind Professionals only) - We'll prepare blind professionals to mentor CIE-Seeker participants during Phase 2 of the project. Curriculum and delivery design are in the works—stay tuned!
6. **Cohort Closing** - Kind of like a graduation—kind of like a party. We'll celebrate your journey, spotlight your stories, and get ready to support the Monarchs who'll rise after you.
7. **Monarch Apps Feedback & Field Testing** - Ongoing and essential. We'll ask for your insights as you use the Monarch and test new features—because your feedback shapes the future.

Project Activities Timetable

	Field Professionals (Target 50)	Blind Professionals (Target 25)
1. Project Intake	Feb 2025 to May 2025	Feb 2025 to May 2025
2. Tech Training	June 2025 to Aug 2025	June 2025 to Aug 2025
3. Experience Exchanges	Sept 2025 to May 2026	Sept 2025 to May 2026
4. Peer Mentoring Training	N/A	June 2026 to Aug 2026
5. Peer Mentoring	N/A	Sept 2026 to Sept 2028
6. Cohort Closing	June 2026	June 2026
7. Feedback & Field Testing	Ongoing through March 2029	Ongoing through March 2029



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Coming Up

Before we flap into full flight, there's a mix of exciting moments and must-do tasks coming your way. Some are fun, some are forms – but all are part of launching your migration with the RISE rabble (that's a third term for a group of Monarchs!). Here's what to expect next:

1. Confirm your Contact Info– May 1 to May 8

We'll send you a short form to verify your details – just to make sure everything's up to date before we dive in.

2. Sign your MOU – May 8 to May 16

Check your inbox mid-May for your Monarch RISE Memorandum of Understanding. Your Monarch ships once we have your signed MOU in hand!

3. Attend Virtual RISE Orientation – May 15 at 11am EST OR May 16 at 2pm EST

Block your calendar for a warm welcome – we'll send you an invite soon!

4. Complete Intake Forms – May 16 to June 2 –

We'll send you forms to collect mandatory participant information required for all Disability Innovation Fund projects. These include things like confirmation of disability status, employment details, and more (if applicable). Want to know how your data is handled? You can review APH's privacy policy here: aph.org/privacy-policy

5. Begin Tech Training in The Hive – It all kicks off on June 2!

These date ranges are a good faith estimate—while we're committed to staying on schedule, things may shift slightly as we progress.

Post-Activity Note:

To meet participants' needs, we later created an Intake Documentation Checklist. For future project phases, we plan to include this checklist in this "Coming Up" section as well as package together intake forms to limit response fatigue.



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Project Links

1. RISE@aph.org : This is the official email we'll use for all project communication. Email will be our primary mode of communication with participants, so please check it regularly—we'll email important updates, instructions, and reminders.
2. [Your Cohort Folder](#): This shared folder will house all important documents related to your cohort, including copies of group emails, reference materials, and any materials shared during the program activities. (Inactive until receipt of MOUs, unlinked for sample)
3. [Monarch Users Group on Facebook](#): An optional opportunity to connect with other Monarch users, learn about the device, find resources, share ideas, and more!
4. [Monarch RISE Webpage](#): (Under construction) This site will include a full overview of the project, info on the RISE team, downloadable resources and materials, and project news and reports.
5. [Monarch Product Page](#): This page includes the user manual, command summary, quick start guide, FAQs, and other downloadable resources to help you navigate and troubleshoot your Monarch device.
6. [APH Monarch Support Team](#): For technical Monarch questions, email or call our dedicated support team at (833)-447-8444.

From paperwork to party mode, you're officially migrating with Monarch RISE. Keep this snapshot handy, stay tuned to your inbox, and get ready to shape what's next.



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Sample Project Professionals Intake Documentation Checklist

- ☐ Access to Professionals Cohort Folder (Microsoft SharePoint folder)
- ☐ Contact Confirmation Form **due EOD 5/8** (Microsoft Form)
- ☐ MOU **due EOD 5/16** (sent via DocuSign)
- ☐ MOU Addendum A **due EOD 5/16** (PDF, in Professional Cohort Folder)
- ☐ Experience Exchanges Needs Assessment **due EOD 6/2** (Microsoft Form)
- ☐ Pre-Tech Training Survey **due EOD 6/2** (Microsoft Form)
- ☐ Disability Verification (upcoming, sending via DocuSign)

Thank you for your active engagement and patience with all forms/surveys/assessments. They will slow down significantly when Tech Training begins!

Post-Activity Note:

Intake Documents were linked in the original document for easy access and this checklist was stored in the Professionals Cohort Folder. For future project phases, we plan to package together several intake forms (i.e. Contact Confirmation Form, Needs Assessment, Pre-Tech Training Survey, etc.) into one intake form to limit response fatigue.



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Sample Monarch RISE Project Virtual Orientation Agenda

- I. Welcome and Housekeeping – Erin Sigmund, Monarch RISE Project Director**
- II. Meet the Monarch RISE Team Leads**
 - a. Paul Schroeder, APH Vice President of Impact and Outreach
 - b. Leanne Grillot, Sr. Director of APH Outreach Services
 - c. Richard Rueda, Asst. Director of APH ConnectCenter
 - d. Greg Stilson, Sr. Director, APH Global Innovation & Strategy
 - e. Tom Winton, Evaluation Specialist, APH Resource Services
 - f. Sarah Gauer, Project Manager, APH Customer Experience
- III. Phase 1 Participant Overview – Erin Sigmund**
- III. Phase 1 Activities – Content Teams**
 - a. Orientation to Tech Training in the APH Hive – Amy Campbell, Director of LMS, APH Outreach Services
 - b. Orientation to Experience Exchanges – Lori Scharff, Content Contractor, APH ConnectCenter
 - c. Intro to Peer Power Hours – Sarah Gauer, Project Manager, APH Customer Experience
 - d. Intro to Peer Mentoring Training – Erin Sigmund
- IV. Activity in the Chat - All**
 - a. What's your Project Story? "As a [blank], I want to [blank] So that [blank]"
- V. Closing/Next Steps - Erin Sigmund**
- VI. Reminders:**
 - a. MOUs via DocuSign
 - b. Reminder to update your Monarchs regularly!

For a sample PowerPoint presentation, please email RISE@aph.org



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Monarch RISE Project Virtual Orientation for Professionals Recordings

Thursday, May 15, 2025 Virtual Project Orientation Recording

https://aph.zoom.us/rec/share/xfNhlrH8gRTSqH4T4S_csbHi0gZffxbYKU5rsx5gjPdqlqFErz0dRoR7aoEVWXh.4cGnyHrhWMm9QwXY?startTime=1747321334000

Passcode: *MxnS4*Yr*

Friday, May 16, 2025 Virtual Project Orientation Recording

https://aph.zoom.us/rec/share/djLzsi56cx3G4FmEVGWMuZp3gQtlN7T2scFcfgr5RNqQeUsYBRtpC_uzmXECIDEO.EZOWdY-bmHUzEkD

Passcode: *N1!?!%182*



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Sample Communication: Tips and Tricks for Sharing Your Monarch RISE Moments on Social Media

Congratulations on becoming a part of the Monarch RISE program! **We know you're going to have some exciting moments utilizing your Monarch, and we want to help you share these important moments on social media.**

Why should you share on social media?

- Increases awareness about the tools that support those achieving and maintaining CIE
- Allows you to share your personal story with your network and beyond

What if I don't have social media but still want to share?

If sharing on social media isn't right for you, we still want to see and hear about your success! You can send photos, videos, and testimonials to RISE@aph.org along with a signed APH Media Release Form!

Best Practices

Privacy and Consent Reminder

Feel free to share your own experiences and moments! However, when posting about your work with clients or students, please ensure you have their explicit permission before sharing any photos, videos, or personal information. As a firm rule, do not share any content featuring clients or students under the age of 18. Protecting student privacy is a vital part of our professional responsibility, so please take care to uphold these and all applicable standards when sharing on social media. Additionally, always review and adhere to your organization's social media policies to ensure compliance.

Photos

- Take your photos in a place with lots of light so the subject is easy to see.
- Make sure the image isn't blurry; don't be afraid to take multiple photos!
- Include alt text that describes the most important parts of the image.

Video

- Take your video in a place with lots of light.
- Describe what's happening in the video either verbally during the video or in the text portion of your post, especially if the video has no audio.
- Always supply captions for video content. Autogenerated captions are available on most platforms. Self-edit if you can for correctness!

Text

- Be authentic- tell your story in your own words.
- **Use our hashtag #MonarchRise** and be sure to capitalize the first letter of both words.
- Tag APH on [Facebook](#), [Instagram](#), [LinkedIn](#), or [X](#)



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