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THE MONTANA SUPPORTED EMPLOYMENT DEMONSTRATION PROJECT: AN EVALUATION OF OUTCOMES

By

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Chapter I. INTRODUCTION

The chronic and pervasive problem of unemployment among individuals with severe disabilities continues to be well documented. According to the U.S. Commission on Civil Rights (1983), 50% to 75% of persons with disabilities remain unemployed. The unemployment rate is especially disconcerting when considering public school graduates with disabilities. Public Law 94-142 was enacted in 1975 to guarantee a free and appropriate education to all children. While major changes have been made in school programming, these changes have not guaranteed a smooth transition to the world of work. The lack of employment opportunities for graduating students has stimulated additional federal legislation to help facilitate transitions to the adult world of work. Included among these laws are the Education of the Handicapped Act Amendment of 1983 (PL 98-199), the Developmental Disabilities Act of 1984 (PL 98-527), the Vocational Act of 1984 (PL 98-524), and the Americans with Disabilities Act of 1990 (PL 101-336).

Unemployment is noted as a major problem in recent studies focusing on postsecondary youth who had received Special Education services during their secondary school education (Hasazi, Gordon and Roe, 1985; Mithaug, Horiuchi, & Fanning, 1985). Students placed in special education classes as opposed to resource rooms consistently had lower rates of
employment than students perceived as relatively higher functioning (Hasazi, Gordon and Roe, 1985; Mithaug, Horiuchi, & Fanning, 1985). These studies can assist in educating personnel in school systems, rehabilitation agencies and adult service agencies about the importance of empirical information regarding adults with disabilities and the current service system's failure to effectively habilitate this population. Some obstacles contributing to unemployment of persons with disabilities include:

**Specific employee and skill deficits:** Persons with disabilities often display behaviors and deficits that conflict with employer expectations and employment norms. People with disabilities may have difficulty learning certain jobs, meeting performance and production standards, or adapting to varying demands across work settings. Productivity has repeatedly been identified in the literature as a factor associated with job success (Brickley, Browning, & Campbell, 1982; Hill & Wehman, 1979; Kochany & Keller, 1981; Schalock & Harper, 1978; Sowers, Thompson & Connis, 1979). Hill and Wehman's (1979) survey of supervisors and co-workers revealed that two major problems presented by employees with disabilities included 1) an inability to change routine and 2) slow work performance. Similarly, Kochany and Keller (1981) suggested that
insufficient work speed and failure to change tasks constitute problem areas for this group of employees.

**Deficit assessment and training procedures:**

Instruments frequently used to identify client needs tell us little about employment prerequisites. The assessment tools that are based on the psychological measurement approach are of little value in identifying adult training needs (Menchetti, Rusch & Owens, 1983). Transition to competitive employment is often hindered by training personnel who lack the knowledge of what skills should be trained, how best to train such skills, and how most effectively to structure programs to facilitate placement in competitive settings (Gold, 1975; Pomerantz & Marholin, 1977; Rusch, 1983). Training for competitive employment is conducted primarily in sheltered workshops, where the typical training method—supervision accompanied by instructions and occasional prompts to stay on task—encourages dependence upon sheltered placement and emphasizes working on overly simplified tasks, rather than developing longitudinal employment objectives (Gold, 1973, 1975; Martin, 1980).

**Disregard for social validation of work goals and procedures:** Social validation refers to methodology
that considers the social treatment context in evaluating community expectations and satisfaction (Wolf, 1978). Social validation combines the basic needs of target individuals and the expectations of employers, co-workers, family members, advocates and other significant persons in developing curriculum and intervention priorities (Rusch, Mithaug & Flexer, 1986). A disregard for social validation of work goals and performance can result in workers being perceived as successful by community trainers while being terminated from their jobs by employers who perceive them otherwise, as is noted by Rusch, et al..

**Lack of a systematic approach to service delivery:** The service delivery system is a series of fragmented services in the area of community and social services, education, vocational rehabilitation and health delivery. Each of these systems was developed independently in response to needs of these areas. Failure to practice coordinated case management planning can result in cross-system interference; for example, psychotropic medication administered in residential settings can adversely affect employment competencies (Agran & Martin, 1982).
Economic and policy considerations deterring efforts to promote competitive employment: A depressed economy that reduces the number of available jobs increases competition between disabled and non-disabled workers, usually at the disadvantage of the former group of employees. Another economic obstacle is the real or imagined fear that competitive employment for individuals with disabilities will result in ineligibility for public support funds (Wysocki & Wysocki, 1979).

National figures of 50 to 75 percent unemployment have been noted in recent years. Regional unemployment estimates have been high among postsecondary school populations. For example, levels reached 88% for moderately and severely mentally retarded individuals in Virginia (Wehman, Kregel & Seyfarth, 1985). In Montana, 81% unemployment for moderately and severely mentally retarded persons has been substantiated (Offner & Arnold, 1988). With unemployment for all individuals served by special education in Vermont at 45% (Hasazi, Gordon & Roe, 1985) and 31% unemployment for all individuals served by special education in Colorado (Mithaug et al., 1985), significantly more research on employment of persons with disabilities is warranted.
Problem Statement

For many years public policy has been guided by the widespread belief that there are large numbers of individuals with disabilities who are incapable of work. As a result, many well intentioned public programs have evolved to provide income support and medical care for these individuals. In recent years, this belief has been sharply challenged. It is argued that many people with severe disabilities are able to work in positions paying significant earnings, provided the necessary services are offered and the right job opportunities are available. If many persons with disabilities are capable of working, then the structure of the publicly funded programs needs to be reexamined to determine whether beneficial changes can be made in them.

A program evaluation of recent efforts needs to be conducted to ascertain whether or not progress is being made. In order to carry out this evaluation, a more detailed discussion of the current and proposed programmatic approaches will be developed followed by a description of the stated intentions of the State of Montana's supported employment system based on an "array of services" model. Based upon the goals and objectives of this model, an assessment of the success of this program to date will be offered followed by recommendations for future activities.
Chapter II. PROGRAMMATIC APPROACHES

Background

Persons with developmental disabilities have the same basic needs, and are subject to the same problems as everyone else. Most of the public services utilized by persons who are developmentally disabled are also used by persons without a disability (e.g., food stamps, Aid to Families with Dependent Children, Supplemental Security Income, public housing, public transportation). The following discussion will focus on the major programs utilized by persons with developmental disabilities which include:

Income Support Programs: The most important programs providing income to persons with developmental disabilities are the Social Security Disability Insurance (SSDI) Program, and the Supplemental Security Income (SSI) Program. These federally funded and administered programs provide monthly benefits to workers unable to engage in substantial work as a result of a disabling condition. In addition, the SSDI program provides monthly benefits to qualifying spouses and dependent children.

The SSDI Program was primarily established to provide income protection to workers who become disabled.
Eligibility depends on the number of quarters of coverage that workers have accumulated. A quarter of coverage is earned when a worker pays social security taxes on earnings that reach a predetermined level. To qualify for SSDI benefits, workers must be fully and currently insured at the time of the onset of disability. A worker is fully insured if he/she has accumulated 40 quarters of coverage during his/her lifetime, has one quarter of coverage for each year after 1950, or has one quarter of coverage for each year after attaining the age of 21 (a minimum of six quarters is required). A worker is currently insured if he/she has 20 quarters of coverage during the 10-year period preceding the onset of the disability, or if under age 31, was covered for half of the quarters after attaining the age 21 (a minimum of six quarters is required).

The SSI program was established to provide a basic level of cash income to needy persons who are aging or disabled and who are not adequately covered by one of the Social Security retirement or disability programs. It pays benefits to qualified persons who do not qualify for Social Security or whose Social Security benefits are less than the basic level established for SSI beneficiaries. To qualify, claimants must be
unable to work because of disability but, in contrast to SSDI requirements, they must also have extremely limited assets. The SSI program was initiated in 1974 and partially replaced earlier state-operated categorical welfare programs for persons who are aging, blind, or disabled (26 states supplement the federal SSI payment, including Montana).

**Health Care Programs:** The Medicare and Medicaid programs are the two principle public programs that fund health care to persons with disabilities. The Medicare program is federally funded and administered and provides benefits to persons with disabilities who qualify for SSDI after a two year waiting period. As with SSDI, eligibility for Medicare does not require the applicant to meet an asset test. As with private insurance, Medicare has co-insurance and deductible provisions that determine the reimbursement levels for specific health services.

Medicaid reimburses the cost of providing specific health services to needy persons. Unlike Medicare, it is state administered but subject to extensive federal regulation, and usually provides full reimbursement for medical expenses. Almost all people who are eligible for SSI are also eligible for Medicaid. The federal
government reimburses states about half of the costs of the Medicaid program.

**Employment Programs:** The most important employment program for persons with disabilities is the state-federal vocational rehabilitation program. This state administered program provides a wide range of services to people with disabilities (i.e., counseling, vocational training, medical restoration). These services are directed at assisting people to return to work.

The Department of Labor also operates several important programs. The Job Training Partnership Act (JTPA) provides federal funds for a wide range of state administered services to economically disadvantaged persons and others who face serious barriers to employment. Among these services are work study programs, work transition activities, job development, and literacy training. The Department of Labor also funds the operation of state employment services that can play an important role in assisting persons with developmental disabilities to locate suitable employment.
A different approach is used by the Targeted Job Tax Credit (TJTC) program, which gives employers tax credit of 50% of earnings up to $3000 for the first year for each person with disabilities that they hire, and a credit of up to $1,500 during the second year.

Other Programs: The federally funded Food Stamp Program is administered by state public assistance offices. Food stamps are distributed to low income persons who must satisfy a combined income and asset test. The Department of Housing and Urban Development provides a rent subsidy to low income persons who reside in public housing. Some persons with developmental disabilities have benefitted from this program.

One misconception about the employability of persons with developmental disabilities is that they cannot work, except possibly in sheltered work environments. Even among professionals who work with persons with developmental disabilities, there has often been great skepticism about their capacity for substantial employment. This bias is reflected even in the most common definition of developmental disabilities that requires that a person be socially incompetent before being considered developmentally disabled.
Until recently, it was generally assumed that people with intelligent quotients (IQ) below 50 could not work. During the last ten years, however, a number of organizations have been developed that specialize in placing persons with severe disabilities in regular jobs. The increasing number of successful job placements is encouraging. A large number of persons with severe developmental disabilities who were formerly thought capable of working only in workshops may, with suitable assistance, be able to engage in substantial employment (Bellemy, Rhodes, Bourbeau, & Mank, 1982; Bellemy, Sheehan, Horner, & Boles, 1980).

Another misconception about persons with developmental disabilities is that their productivity and earnings will be low or minimal. This is based on the belief that productivity varies directly with intelligence. Therefore, the more severe the level of intellectual limitation, the lower the productivity and earnings (Elder, Conley, & Noble, 1987). Most persons who are developmentally disabled can find or be helped to find a job that makes use of their existing intellectual and physical capacities and that will enable them to make a substantial contribution to the employer. They do, however, usually have fewer types of jobs that they can perform and much less knowledge than those without developmental disabilities about how to locate and obtain them. Persons with developmental disabilities
are very dependent on assistance in locating suitable work.

A third misconception is that the intellectual limitation is the primary reason suitable work is not found. A large percentage of persons with mild mental retardation (those with IQs of 50 to 70) who successfully obtain substantial work along with the size and diversity of the job market should make it obvious that limited intellect is not a major barrier to employment for them. In the job market, there are thousands of types of jobs, each requiring a different combination of reasoning ability, strength, dexterity, experience, training, and other traits. There are many jobs which can utilize persons with limited intellectual capacities. Most persons with developmental disabilities, if given the opportunity, can carry out these jobs as well as people without developmental disabilities.

**Program Considerations**

Many persons with developmental disabilities have emotional and physical handicaps. Because of these disabilities, people with developmental disabilities are excluded from many unskilled jobs. Thus, the number of jobs within their capability are greatly reduced. Few employers would care to employ persons with developmental disabilities who are also belligerent or withdrawn. Such behaviors disrupt production and employers avoid hiring people who exhibit these
characteristics. There are other personal attributes of persons with developmental disabilities that affect their prospects for employment. These include whether or not they want to work, can get along with coworkers, or they believe they are capable of working. Employers may fear that hiring workers with developmental disabilities causes the costs of production to rise, due to the sometimes higher use of sick leave and higher health care costs. Many other factors influence whether people with developmental disabilities obtain work include the availability of work, the availability of services, the strength of the economy, their acceptance by nonhandicapped workers, and fear of loss of public benefits.

Current Service System Provision

Many adults with developmental disabilities are employed in workshops rather than in regular jobs. During 1976, slightly less than 90,000 individuals with developmental disabilities were placed in workshops: 16% were in regular sheltered workshop programs, 12% were in training and/or evaluation programs, and 72% were in work activity centers (U.S. Department of Labor, 1979). A survey by Bellemy and Buckley (1985) reported that during the 1983–1984 time period, about 136,000 clients were served in day activity programs or work centers that received funding from state agencies for persons with developmental disabilities.
Traditionally, the two goals of sheltered workshops have been to prepare the less severely handicapped workers for employability in the competitive labor market, and to provide long term sheltered employment and supportive services for the more severely handicapped persons. Unfortunately, workshops have poor records in attaining these two goals in the case of clients with developmental disabilities. Few who are in sheltered workshops, work activity centers or day activity programs move into competitive employment. In fact, Bellemey, et al. (1982) reported that only about 3% of the clients with developmental disabilities who are in work activity centers or in day activity programs move to a higher level of vocational activity each year. There may be several contributing factors to this outcome. Most workshops, particularly those that are small, are limited in the variety of jobs they offer, making it difficult to place clients in jobs that are suitable for their capabilities. Most workshops are limited in their ability to employ efficient methods of production because they must usually attempt to utilize large numbers of severely limited workers and too few skilled workers. They also cannot match the productive efficiency of private firms. They lack the capital, experience, technical knowledge, employee skills, size, and marketing capacity (Cho, 1981).
Current System Impediments of Employment

There are many aspects of the existing system of services that stand in the way of employment for persons with disabilities. One of the main problems with the public programs is the major work disincentives that they create by reducing the net gain from work, fostering of dependency and negative attitudes toward work, and the offering of greater income security to persons who continue as beneficiaries of these programs than could be obtained in regular employment. These work incentives are an unintended consequence of the restrictive legislative mandate of these programs, which is to provide basic income support and health care financing to persons with disabilities only if they are unable to engage in work because of the disability (Conley, Noble, & Elder, 1987). The SSI, SSDI, Medicaid and Medicare programs define disability as:

the inability to do any substantial gainful activity by reason of a medically determinable physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months (U. S. Department of Health and Human Services, 1982).

Substantial gainful activity (SGA) is defined as earnings of $500 or more per month (U. S. Department of Health and Human Services, 1990). Thus, eligibility for the SSI and SSDI programs requires that a person with disabilities be unable to earn approximately $2.00 or more per hour on a full time
basis at a job somewhere in the United States. If they do receive benefits under either of these programs and earn more than $500 per month, benefits are terminated.

For persons with handicaps, continuation of medical benefits is often more important than continuation of income benefits. The problem with SSI/SSDI beneficiaries with disabilities who return to work is that they are unable to obtain health care coverage either as a fringe benefit where they work or as an individual because insurance companies often do not cover people with certain types of preexisting conditions. Before 1981, SSI and SSDI beneficiaries who returned to work (or became employed for the first time) and as a result lost their SSI/SSDI income because they reached the SGA level, would also lose their eligibility for Medicaid and Medicare coverage. In 1980, however, Congress passed a provision which enabled SSI and SSDI recipients to continue to receive Medicaid and Medicare benefits for another 48 months even though they had reached the SGA level and their income was too high to be eligible for SSI and SSDI benefits. Although this benefit provision for Medicaid and Medicare greatly reduces the work disincentives that existed before 1981, it does not eliminate all such disincentives (i.e., what happens after the 48 month trial period is over).
Decisions about when and where to work, or whether to go to work at all, are based on the amount that an individual can earn and how secure the job is. The desire for income security creates a strong disincentive among beneficiaries of public income support and health care programs. It is not reasonable to expect these beneficiaries to give up easily what appears to be a secure monthly cash income and assured medical care in exchange for jobs that are often temporary or insecure, and that pay little more or possibly less than their monthly benefit.

Another major work disincentive arises from the need of the applicants to prove that they are unable to engage in substantial gainful activity in order to establish eligibility for SSI or SSDI (Conley, et. al., 1987). The process for determining eligibility may last from 2 months to 1 year and during that entire period, applicants are impelled by the system to prove that they are unable to engage in substantial work. Assistance in documenting work disability is solicited and usually obtained from vocational specialists, doctors, lawyers, social workers, family, and friends. These professionals sometimes coach applicants in methods to gain eligibility. This process of documenting work disability may convince applicants of their inability to work. Negative attitudes toward work are further reinforced by the fact that benefits will continue to be
paid to successful applicants only if they can demonstrate ongoing inability to work. One study of worker's compensation shows that claimants who do not need to prove the extent of their injuries generally fare better in employment than those with comparable injuries who become involved in litigation over the extent of their work disability (Ginnold, 1984). The eligibility determination process and the conditions attached to continued receipt of benefits may destroy the will to work.

Many people receive benefits from more than one program. It is necessary then, to measure the combined value of all program benefits that must be given up as a consequence of engaging in substantial gainful employment in order to obtain the full picture of the work disincentives facing these beneficiaries. The number of programs that provide support and benefits is substantial. Most people who receive income support (SSI, SSDI) also receive health benefits (Medicaid, Medicare). As mentioned earlier, other benefits that people may receive because they are unable to work include food stamps, rent subsidies, public housing, state social services, Aid to Families with Dependent Children, and private insurance. Additional problems associated with the receipt of multiple benefits are caused by the different eligibility conditions associated with the different programs.
Many of these programs are managed independently of each other, and each has its own set of goals, priorities, eligibility conditions, and operating procedures. Program managers often tend to be quite unconcerned whether these goals, priorities, eligibility conditions, and operating procedures support or interfere with those of other programs. The inherent difficulties of making these programs operate as a system are further complicated because some programs are managed at a federal level (SSI, SSDI, Medicare), and others at the state level (Medicaid, vocational rehabilitation).

Another reason the service system does not always effectively assist persons with severe disabilities to obtain and maintain employment is that appropriate services are often not available. Sometimes the lack of services is due to low levels of funding. In 1985, only two of 48 service providers who contract with the Developmental Disabilities Division of the Department of Social and Rehabilitation Services had supported employment service provisions within their contracts, largely because of insufficient funding statewide.
**Supported Employment Initiative**

At the heart of the national supported employment initiative lies a shared federal and state commitment to incorporating individuals with severe handicaps into the nation's workforce. The goal of supported employment is the utilization of new and existing rehabilitation technologies to enhance the economic self-sufficiency of a large group of citizens who previously were unable to earn meaningful wages in competitive employment. Supported employment is paid work which occurs in mainstream, integrated business environments for persons who, because of severe disabilities, have failed either to secure and/or maintain competitive employment. The concept involves a philosophical commitment to the integration of these individuals into all facets of life in local communities.

Supported employment has begun to demonstrate that many individuals with severe handicaps can engage in competitive work for competitive pay. One entrance criterion for supported employment is based upon each participant's inability to function independently in mainstream employment without intensive extended support services at the workplace for most disability groups or if appropriate, away from the workplace for individuals who are seriously mentally ill. Unlike other models of vocational rehabilitation, supported employment is predicated on a commitment of long-term,
permanent (daily or intermittent) support for individuals throughout the duration of their employment. The extended support involves the continued provision of training, supervision and other services to the participant on a scheduled basis through the use of a job coach or employment specialist.

The supported employment initiative was advanced in fiscal years 1985 and 1986 through the award of 27 nationwide discretionary grants by the Rehabilitation Services Administration (RSA), which established these demonstration projects to assist states in rehabilitation "systems changes" from day and work activity programs to competitive work through supported employment.

The political and philosophical values embodied in the supported employment initiative have affected a large number of agencies and programs. For example, the Supplemental Security Income (SSI) program has been modified to provide new work incentives under sections 1619 (a) and (b) of the Social Security Act, while the Social Security Disability Insurance (SSDI) program has been analyzed in light of concerns that it promotes dependence and presents obstacles to individuals with severe handicaps attempting entry or reentry to the workforce. It is within this climate that
state rehabilitation agencies face the challenge of implementing supported employment.

**MSED Project Design**

The goal of the Montana Supported Employment Demonstration Project is to establish and implement necessary systemic changes to ensure that, by 1991, 60% of adult Montanans with severe disabilities are employed and retained in integrated work settings. A five-year plan has been outlined to accomplish this goal. The design of this plan has taken into consideration an analysis of the current system of ongoing day and vocational services for persons with severe disabilities as it relates to the desired system of supported employment that will be in place by 1992. The following sections provide: a description and critique of the current system in Montana, a description of the desired process of supported employment, the Project objectives for establishing and implementing the desired system with their rationale and anticipated outcomes and impacts, and anticipated barriers to implementation.

**Montana's Current System**

The delivery of services to severely disabled persons has been established as a public responsibility by state and federal statutes. Montana law defines the services and treatment to which persons with severe disabilities are
entitled, establishes their various rights (including the right to habilitation under the least restrictive conditions), and establishes a framework for delivery of appropriate services. Presently, four state agencies of Montana government (Social and Rehabilitation Services, Office of Public Instruction, Institutions, and Health and Environmental Sciences) are directly involved in the service system for persons with disabilities. Three are executive branch agencies accountable to the Governor; the fourth, the Office of Public Instruction (OPI), is accountable to a separately elected superintendent. The OPI is established in Montana’s Constitution, while the remaining executive agencies are established in the state’s Executive Reorganization Act and are subject to review by the Governor and Legislature.

An additional executive branch agency, the Department of Labor and Industry (DLI), also has some responsibility within the employment area covered by this project. The DLI’s Employment Policy Division oversees the State’s implementation of the Job Training and Partnership Act (JTPA) and the state’s two Private Industry Councils (PIC). The Job Service Division is responsible for Montana’s twenty-three Job Service Offices.
For implementation of services, the state is divided into service regions or areas. Rehabilitation/Visual Services, Mental Health Services, and Developmental Disabilities Services use a five region organization. Maps of these regional/area breakdowns are provided in Appendix A.

Although Montana's current system of service delivery for persons with disabilities emanates from these state agencies, the system primarily is implemented and controlled locally. Most community-based services for persons with severe disabilities are operated by private non-profit corporations with whom the state contracts for the delivery of services ranging from educational and habilitative/rehabilitative programs to group homes and transportation.

The present strength and diversity of the service system are credited to community "ownership" of the service programs. The existence of governing boards of local agencies and corporations, comprising a cross section of each community, ensures broad-based support and access to various community resources. These assets are beneficial not only to the service program, but to the individual clients in their community contacts as well. Further, community ownership allows greater flexibility to respond to local priorities and reinforce local support.
One outcome of Montana's service approach -- state administered and locally controlled -- is that successful initiatives for system change require local support. Thus, development and change in the state's service system for persons with severe disabilities often are precipitated by local needs. Beginning at the direct service level as opposed to the administrative level is very typical in the development of rural services, where it is considered important to build the service system as a component of the community (Coward, DeWeaver, Schmidt, & Jackson, 1983). Vogelsberg (1985, p. 59) points out that:

While there are multiple differences between the rural and urban setting, the technology (a behavioral approach to habilitation) is the same. The application and politics are varied by population and geography, but the actual training technology is exactly the same.

The system of services for persons with severe disabilities that exists today in Montana has experienced a decade of tremendous change. For example, the budget for persons with developmental disabilities grew from $4.6 million in fiscal year 1974 to over $14 million in 1984. With increased fiscal support has come a comprehensive network of services for Montanans with disabilities. Serious service delivery challenges, however, face those agencies and programs charged with developing services for the state's citizens with severe disabilities.
Service Challenges in Montana

Montana encompasses one of the country's great rural/remote centers and one of the most productive areas of agriculture. Diversity, extending to the cultural, economic and political life of the people, has influenced special traditions and values that have contributed significantly to the development of the state. With less than one million people, Montana ranks 44th nationally in population, yet fourth in size. This combination of large size and few residents contributes to a population distribution second only to Alaska in sparseness (i.e., an average of about five persons per square mile).

To put this into perspective, Figure 1 shows the physical size of Montana in relation to the rest of the continental United States. As the figure illustrates, if Montana is placed so that Washington, D.C. is on its eastern border, it would extend to Chicago on the west. Thus, the state is essentially rural and vast distances separate towns and cities from one another. One can drive 13 hours and still not cover the state from eastern to western borders.

While vast lands and open spaces have long characterized Montana as the "Big Sky" country, it is the vastness and openness that presents Montana with many of its more complex service delivery challenges. Foremost among these
challenges is that of developing and maintaining the resources (i.e., trained professionals, services and programs) necessary to appropriately identify and serve Montana's citizens with disabilities.

Montana's current system of services for severely disabled persons falls short of meeting the needs of many individuals. Although adequate services are available in most parts of the state, primarily based on a sheltered workshop model, the continuum of services for persons with severe disabilities has not afforded employment opportunities for a significant number of those individuals who are considered hard to train or place. Currently, 53% of the state's citizens with disabilities are unemployed.
(Bowe, 1984). Further, the statistics for persons with developmental disabilities are worse; less than one in every ten Montanans with developmental disabilities are employed.

Similar to many other states, as noted by Will (1984), the traditional program responses for the majority of Montanans with severe disabilities are either time-limited vocational rehabilitation services leading to employment, or placement in a sheltered workshop or other day treatment program. Since individuals receiving time-limited services are expected to move to competitive employment without support in a short period of time, those cases in which the individual cannot achieve independence typically are closed by Vocational Rehabilitation, unless a position in an extended employment program within a sheltered workshop is available. Further, individuals with developmental disabilities, as defined by state statute, are routinely placed in segregated day programs where opportunities for employment in integrated work settings are minimal.

A Critique of the Current System

The current service system in Montana for persons with severe disabilities, like most states, can be generally described as a continuum. The notion of the continuum was defined by the President's Committee on Mental Retardation in 1962 as a system in which comprehensive services are
available to meet the needs of a person with a disability at every point in his or her life. As the person's needs change over a life span, she or he could move from one type of service to another.

In general within Montana's continuum of services, specialized service programs have been created and specific services and types of eligibility have been assigned to each level of the continuum. Persons with severe disabilities typically are served in groups with others who have similar levels of independence and needs for training and service. Ideally, individuals are placed in the best available program alternative, and as their skills progress and increased independence is acquired they move through the service continuum toward the least restrictive placement (Calkins, et al., 1985).

There are a number of advantages to this service approach. First, it is relatively easy to conceptualize and administer. Second, homogeneous grouping of clients with similar intervention needs allows for efficient use of trainer time and expertise. Unfortunately, there are many problems with the approach and several aspects of the continuum approach are now being questioned by experts in the field (Fifield & Smith, 1985).
For example, the way the approach is implemented has emphasized the development of separate levels of specialized services or programs with different levels of restrictiveness. Thus, services primarily are segregated and provide only a limited amount of interaction with nondisabled peers, making it difficult to engage in meaningful employment-related activities. Further, if a placement in the most appropriate program is not available, there is a good possibility the individual's freedom, participation, or progress may be restricted. In most respects, the continuum approach requires that the person fit the system rather than the system be designed to meet the person's needs.

A common result of the continuum approach (Calkins et al., 1985), and one that is a critical problem in Montana, is the waiting list. Although the goal is for the client to move along the continuum to increased independence, little movement typically occurs and ultimate outcomes for greater independence are not achieved. Hence, the system becomes stagnated, as very few placements open up and lists develop of individuals waiting for appropriate placements. For example, in Montana the waiting list for services in the developmental disabilities service continuum exceeds 800 names.
An alternative to the continuum approach recently has been proposed (Calkins et al, 1985; Davis & Trace, 1982; Fifield & Smith, 1985), and referred to as the "array of services" approach. Fifield and Smith (1985, p.31) suggest that the array of services can benefit the system in several significant respects:

(1) Resources can be distributed to a variety of services, not just those designed for the most restrictive setting. Payments for services will follow clients rather than programs (Bruininks, Hill, Lakin & White, 1985).

(2) Clients can be placed directly in the highest level of service possible.

(3) Payments for services can be designed to provide incentives for movement toward less restrictive settings and greater independence.

(4) Case management, parent and advocacy involvement are being required along with shared decision-making.
Fifield & Smith (1985) note that the array of services approach "represents a systemic change that will provide an opportunity to redirect resources to appropriately accommodate the increasing number of adult clients entering the system."

Designing an Array of Services Approach to Supported Employment

Calkins, et al. (1985) describe an array of services approach in the following manner:

It is a client-referenced system in which client needs are assessed, available resources (both specialized and generic) are reviewed, resources are identified or developed to meet client needs, and services are evaluated on the extent to which they assist in moving the client closer to the achievement of ultimate outcomes. Clients are placed in a less restrictive environment and the needed services and support systems are brought to the person. All of the supports necessary to succeed are provided initially and are gradually withdrawn as they are no longer needed. As the client's needs change, services are added, reduced or withdrawn and thus generic or specialized services can be used on an as-needed basis. Since the setting is modified to meet needs, clients have to move less often.

The conceptualization of an array of services described above fits very well into Montana's plan for designing a statewide supported employment system that addresses the needs of the target population of persons with severe disabilities. Unlike the current continuum approach that
primarily is service system-referenced, the proposed system is decidedly client-referenced.

The primary consideration in establishing a statewide system of supported employment opportunities for Montanans with severe disabilities is the assurance that each individual moves toward maximum independence and economic self-sufficiency. In their discussion of the "Pathways to Employment" model, Kiernan, et al. (1985) note that individuals are faced with numerous choices and decision points that may lead to enhanced economic self-sufficiency, suggesting that:

The process does not target specific jobs as the outcome, but rather the effects of moving the individual into an employment status...it is an attempt to expand the variety of environments in order to create opportunities for [persons with severe disabilities] to work in various industrial and community settings.

Designed to meet the diverse needs of the state's citizens with severe disabilities and the services that have been established for them, Montana's supported employment system ultimately will be administered and coordinated at the state level and implemented locally. Therefore, the design of the system will take into consideration issues that are associated with (1) institutionalizing the state-level operation, and (2) developing local capabilities.
Wehman and his colleagues (Wehman & Kregel, 1985) have identified several operational considerations that need to be addressed in order to successfully implement a supported employment system. The MSED Project has incorporated these following points into its planning process for statewide systemic change:

1. Public policy commitments and financial inducements must be established to encourage the placement of people with severe disabilities into supported employment.

2. Rehabilitation agency officials and vocational training and placement services should encourage or stimulate the use of supported work models.

3. Funds need to be directed to sheltered workshops and other community service programs to develop training programs that are closely linked to jobs in supported employment.
(4) Personnel in community service programs, including sheltered workshops and other rehabilitation staff, must receive extensive training in job placement, job site training, and follow-up strategies.

(5) Demonstration programs need to be established for innovative community service programs that focus on employment.

The MSED Project has taken into consideration Montana’s current service system for persons with severe disabilities, along with systemic changes required to actualize the desired supported employment system, in identifying eight principal project objectives designed to ensure that, by 1992, 60% of adult Montanans with severe disabilities are employed and retained in integrated work settings. Those objectives are:

Objective 1: By September 30, 1991, increase the capability of professionals in Montana’s service system to provide supported employment opportunities for persons with severe disabilities by developing and
delivering a competency based supported employment training program to 75 persons.

Rationale. Implementing a statewide supported employment system for persons with severe disabilities presents unique problems for personnel in educational and community service programs (Wehman & Kregel, 1985). In Montana, the preservice preparation of special or vocational educators and community-based service providers generally does not lead to specific competencies for training and placing individuals with severe disabilities into competitive employment, working with employers, or developing methods for ongoing job support, follow-up, or retention. Consequently, most professionals serving the state's citizens with severe disabilities are minimally prepared to engage in implementing supported employment models. Wehman and Kregel (1985, p. 40) suggest that:

Much more attention must be given to active job placement and training as opposed to counseling techniques, and follow-up strategies. As clients with more severe handicaps are referred for services, counseling skills will want in importance and behavioral training skills will become imperative.

In Montana the responsibility for preparing human service professionals is shared between the higher education system (pre-service) and the state administering agencies (in-
service). Historically, there has been a lack of synchronization between universities, colleges, and the service agencies in the joint planning of efforts to meet training needs (Middendorf, Fifield, & Smith, 1985; Stedman, 1977). Bridging the gap between higher education and community services to work cooperatively on identifying training needs and providing the needed educational and technical support to meet those is an important step in advancing the service system.

**Anticipated Outcomes and Impact.** The MSED Project will establish "Demonstration and Training Centers" for supported employment in Missoula and Billings, Montana, to provide the foundation for offering intensive training in supported employment technology for the state's education, rehabilitation and community-based service professionals. Placing these centers in Missoula and Billings will allow them to be proximal to the University of Montana and Eastern Montana College, respectively and enable students and faculty in majors such as special education, rehabilitation counseling, social work, and psychology to gain preservice experiences in supported work. These centers also will serve as sites for providing intensive in-service educational experiences for professionals in the state's service system for persons with severe disabilities.
In addition to providing "center-based" training experiences, the MSED Project will conduct workshops throughout the state on various topics related to supported employment. These workshops will target personnel such as program supervisors, counselors, instructors, case managers, and administrative staff with the intent being to generate a shared understanding of the importance of employment and the potential of supported work models.

Objective 2: By September 30, 1991, demonstrate three distinct approaches to supported employment that are appropriate for Montana's service delivery challenges.

Rationale. Over the past several years there has been an increasing body of literature on supported employment models and practices. Today, four supported employment models have received widespread acceptance (Mank, Rhodes, & Bellamy, 1986): benchwork, mobile work crews, enclaves, and distributed work. In Montana, examples of effective supported employment practices in services for persons with severe disabilities have included the use of distributed work ("job coaching") and mobile work crews. Little data is available to suggest that a rural state like Montana will require the development of vastly different models of supported employment (Vogelsberg, 1985). However, it is
clear that enhancing the employment prospects of persons with severe disabilities requires that client training reflect local labor market needs (Wehman & Moon, 1985). Therefore, to meet its specified goal, the MSED Project must demonstrate effective strategies for implementing various supported employment approaches that are appropriate for labor market needs that vary greatly across the state. Mank, et al. (1985) point out that employment for persons with severe disabilities also must take advantage of a community's distinct needs, and that no single supported work alternative can fit all situations. Thus, it is additionally important that supported employment models implemented in Montana demonstrate that they are adaptable not only to the labor market, but to the service requirements, capacities, and constraints of the agencies and communities involved.

The MSED Project has selected a target population of persons with severe disabilities that is quite broad, encompassing not only individuals that are served by developmental disabilities and vocational rehabilitation programs, but individuals in the educational and mental health service systems as well. For this reason, supported employment programs that are developed in Montana will need to demonstrate their utility for serving various populations of individuals with severe disabilities. Further, there is a
great diversity in the size of the agencies serving the target population. Some agencies serve as few as 10 clients with an operating budget of less than $250,000, while other agencies have multi-million dollar budgets and serve several hundred clients. For this reason, supported employment models that are developed for implementation in Montana also will need to consider limitations that are placed on agencies as a result of their size (e.g., staff and fiscal resources).

**Anticipated Outcomes and Impact.** Working with MSED Project staff, the Demonstration and Training (D and T) Centers in Missoula and Billings will identify supported employment approaches that are appropriate for Montana’s service delivery challenges and validate them through demonstrations and evaluations. Assistance in implementing demonstration approaches will be obtained by procuring consultation from recognized experts in supported employment models (e.g., Virginia Commonwealth University, University of Oregon, University of Wisconsin). These demonstrations also will serve as resources for the training experiences provided under Objective One. Additionally, Project and D & T Center staff, along with outside consultants, will provide assistance to service agencies in replicating the various validated approaches/models across the state. The models of
supported employment identified to be demonstrated in various communities around the state are:

* the individual placement model, which is the placement of an individual with severe disabilities into integrated, competitive employment with job coach support. Job coach support initially is one-to-one for the entire work day and gradually decreases as the worker becomes more proficient. Beginning on the first day of employment, a job coach teaches the worker employment and work-related skills necessary to perform all job duties to the employer’s standards. During on-site training, the job coach closely monitors the worker’s rate of progress in performing all skills to criteria. The job coach also works with employers and co-workers in the development of a supportive work environment. Once the worker performs the job to the employer’s expectations the job coach gradually and systematically fades from the work site. Ongoing support is provided, as needed, for as long as the worker is employed. The length of on-site training varies depending on the individual needs of the worker.
The major service components of the individual placement model include individual assessment, job development, job analysis, consumer/job match, on-site training and advocacy, and ongoing assessment/support. A quality consideration regarding the individual placement model is that the employer directly pays the supported employee just as the other employees are paid. In most cases, supported employees are paid the prevailing wages (at least minimum wage for entry level positions) unless they are unable to perform the job to the employer's standards. Increased wages and benefits as well as a chance for upward mobility are the obvious advantages of the individual placement model over traditional day services. This model of supported employment naturally supports community participation and other opportunities which enhance the image of the employee who has severe disabilities;

* the enclave model, which is the employment of a full-time supervisor and a small group of individuals (three to eight) with severe disabilities at a business where they work together within an integrated setting. The supervisor and/or supported employee may be
employed by the business or by the adult service provider. The provider must develop the enclave site(s) by conducting a community feasibility study, contacting and screening businesses, computing an analysis or bid, establishing a working relationship with the preferred business (agreement/terms contract), and planning for a systematic start-up (hiring of supervisor and persons with severe disabilities). Other service components in an enclave include individual assessment, job analysis, consumer/job match, on-site training and advocacy, and ongoing assessment/support.

As with any supported employment arrangement, workers are paid commensurate to their productivity. Continuous ongoing supervision is provided to individuals participating in the enclave mode. Training continues based on individual need. The reassessment of wages earned and the ability to work with less supervision should be re-evaluated on a frequent basis. In an enclave, workers are normally responsible for their own transportation to and from work. If transportation training is required for any worker, it should be provided by the adult service
provider developing the enclave. Wages, benefits and potential integration opportunities leading to image enhancement are the enclave's primary advantages over traditional day services. Enclaves may be appropriate options for individuals who need ongoing supervision because their needs are unpredictable and may require intervention on a daily basis. An enclave may be an appropriate alternative for an individual who has been unable to maintain employment via the individual placement model of supported employment; *the mobile work crew, which is the employment of a full-time supervisor and a small group of individuals (three to eight) with severe disabilities who travel to two or more work sites in the community where they engage in contracted work. In this model the supervisor is typically employed by the service provider. As a part of contract development, staff must search for and procure work, figure and submit bids, develop contracts and plans for an orderly start-up in which their work is completed as specified. Other components included in the mobile work crew model are individual assessment, job analysis,
consumer/job match, on-site training, and advocacy and ongoing assessment/support. A mobile work crew offers continuous, ongoing supervision. Workers are paid commensurate with their individual productivity. Training continues based on individual need, the reassessment of wages earned, and the ability to work with less supervision. These components should be re-evaluated frequently.

Transportation for crew workers is often provided by the service provider. Members frequently travel to individual contract sites in an agency van. Unless the crew contains workers who are not disabled, integration is often problematic for crews, especially if they work in the evening when the buildings they work in are closed. In such instances, there should be a plan for integration during dinner or breaks in public places away from the work site. Crews may be appropriate for individuals who need ongoing supervision because their needs are unpredictable and may require intervention on a daily basis. Crews may also be desirable for individuals with transportation problems if the agency's van can pick them up and take them home. The largest distinction between
an enclave and crew is that an enclave works for one business at one work site as opposed to moving about the community from contract to contract as a mobile work crew does; and

the entrepreneurial model, which is a private business that produces goods or services either on a subcontract basis or as a primary manufacturer. The business employs a small group of individuals (three to eight) with severe disabilities as well as co-workers who are not disabled. The entrepreneurial model also includes the procurement of contracts, job design, production and quality control, and must assure that deadlines are met. The start-up costs for the entrepreneurial model can be quite expensive. Other components of this model are individual assessment, job analysis, consumer/job match, on-site training, and advocacy and ongoing assessment/support. Implementation of initial training procedures varies with the business and with supervisors. Some businesses have a job coach work one-on-one with a new employee while others delegate the initial training responsibility to a supervisor who brings in an employee with severe disabilities when the rest of
the business is functioning smoothly. In most cases continuous ongoing supervision is provided for each supported employee. Training continues based on individual employee need. The reassessment of wages earned and ability to work with less supervision should be re-evaluated frequently.

The entrepreneurial model of supported employment can be advantageous to individuals with severe disabilities who need integration opportunities at work and more intensive training and supervision. Private ownership affords flexibility, therefore, socially unacceptable behaviors and other needs requiring intervention may be more easily tolerated and managed at the worksite (Hefeneider & Schilling, 1991).

While Montana is committed to making the necessary systemic changes to establish a statewide system of supported employment, the state currently lacks much of the required expertise and technology to accomplish that task. Through the development and evaluation of supported employment demonstrations the state will acquire the necessary expertise and technology, and subsequently the widespread dissemination/replication of that technology, so that by
1992, 60% of the state's adults with severe disabilities will be employed and retained in integrated work settings.

Objective 3: By September 30, 1991, increase employer participation in the supported employment of persons with severe disabilities by 200%.

Rationale. Employers in Montana generally are not equipped to accept or manage personnel with severe disabilities in their work places. Consequently, the range of employment opportunities for adults with severe disabilities is limited in many parts of the state and contributes to a high level of unemployment within the target population.

In a recent survey of experts in the employment of persons with developmental disabilities on barriers to employment, Kiernan and Brinkman (1985) report that the second most frequently identified barrier, behind "economic and benefit disincentives" (75%), is employer perceptions and attitudes (63%). In Montana, there is a need for a greater shared understanding and knowledge between human service professionals and industry representatives that will engage them in team efforts to expand the employment options for the state's adults with severe disabilities.
The enlistment of employers to hire persons with severe disabilities often is an intensive effort that requires a significant degree of salesmanship (Kiernan & Stark, 1985). Human resources are among an employer's most valuable assets. Yet, with a projected shortage of qualified workers in the future, employers are recognizing the need to look for new, different, and innovative sources of workers. This need can be addressed in the promotion of employment opportunities for persons with severe disabilities.

While many employers are willing to hire persons with severe disabilities because they believe in the "abilities" of these workers or because of some other altruistic reasons, others will need to be sold on some incentive basis (Merritt, Offner, & McNally, 1986). Kiernan and Stark (1986, p. 191) suggest that:

Industry would much rather have you say you are interested in people with problems than use the word "advocacy." You can get employers extremely excited about doing things for people if there is a true business-oriented outcome. If you go to business people and expect them to come forward and wave a flag for you on the basis of sympathy it isn't going to work. Use statements such as, "It's good business to..." Business is the key. If you can get them enthusiastic about one of your clients you probably can get them enthusiastic about others.

Anticipated Outcomes and Impact. Working in conjunction with the Governor's Committee on Employment of People with
Disabilities, the State's two Private Industry Councils, and other industry representatives (e.g., local Chambers of Commerce, trade associations) the MSED Project will develop and maintain an active educational program directed at employers. An important aspect of these educational activities will be the integration of service providers with employers in shared learning experiences. In essence, these activities will provide a framework for marketing rehabilitation efforts with employers in the state. Consequently, industry can let rehabilitation know about its business needs, anticipated job openings, and future labor needs; rehabilitation can let industry know about what severely disabled persons can do on the job and how those individuals can come to be employed with support (Kiernan & Stark, 1986).

Objective 4: By September 30, 1991, establish a single point of access (SPA) in five communities to employment services for persons with severe disabilities that provides effective case management leading to employment outcomes.

Rationale. Currently in Montana, a number of isolated supported employment programs are available to a small percentage of the state's citizens with severe disabilities. Specific local agencies or programs under the auspices of
the five major service divisions of the state may offer job placement and employment support. However, there is no way to predict the availability of supported employment opportunities within the current system. There is little or no interagency coordination, and in most cases a client cannot find supported employment in the existing system. Therefore, there is a need in Montana to create a system that effectively leads to employment outcomes for persons with severe disabilities.

The statewide system is expected to move Montana from a reliance on a "continuum of services" approach to an "array of services" approach (Calkins, et al., 1985; Davis & Trace, 1982; Fifield & Smith, 1985). To accomplish this task, it will be necessary to develop a mechanism for coordinating state-supported services to ensure that persons with severe disabilities receive those services that will lead to employment and maximize their economic self-sufficiency. The establishment of a single point of access will provide individuals with severe disabilities and their families with a means to efficiently and reliably access the array of services needed for the individual to obtain and retain employment in integrated work settings. Because vocational evaluation is the principal component of a process that ensures appropriate employment outcomes, Montana’s Rehabilitation Services Division is the logical site of the
proposed single point of access. However, to effectively implement this approach a strong interagency foundation of commitment, support, and coordination is required.

Anticipated Outcomes and Impact. Under the Rehabilitation Services Division of the Department of Social and Rehabilitation Services, the Single Point of Access (SPA) will (1) determine the individual's employment needs through a thorough vocational evaluation, (2) provide case management in the form of specific assistance, support, and encouragement to the individual at critical decision-making points to mobilize the array of services that the individual needs to obtain or maintain employment, and (3) provide an interagency liaison to promote active coordination and cooperation between service agencies and professionals.

The success of the state's efforts to achieve significantly improved employment outcomes for persons with severe disabilities hinges greatly on the ability of the state to create a system that promotes and supports equal employment opportunity. With the SPA in place, Montana will have the organizational foundation for a statewide supported employment system.

Objective 5: By September 30, 1991, inform consumers, parents, professionals, employers, and others
about the nature and purpose of supported employment for persons with severe disabilities, and for purpose of gaining support in the systematic change process, through a minimum of ten statewide educational events.

Rationale. Lack of information is an ever-present impediment to system change. It is challenging to develop effective mechanisms for disseminating the right information to the right audiences at the right times in order to support the systemic change process. Thus, the effective dissemination of information requires specific, organized marketing strategies.

Anticipated Outcomes and Impact. An information marketing plan will be developed and implemented that will direct the dissemination of information and materials. Specific vehicles for information marketing will include:

** Flyers and brochures;
** Quarterly newsletters;
** An annual statewide supported employment conference;
** Presentations at state and national conferences;
Monographs of project demonstrations, training, procedures, and system documentation; and

Annual reports of project activities and outcomes.

The MSED Project anticipates that widespread awareness on the part of consumers, parents, professionals, employers and other parties will result from the planned information marketing strategies. The project is prepared to obtain expert consultation from marketing professionals at the University of Montana School of Business to assist in the information dissemination/distribution process.

Objective 6: By September 30, 1991, provide fiscal and technical assistance to facilitate the development and implementation of supported employment practices within Montana's service system for persons with severe disabilities through four rounds of supported employment start-up grant cycles.

Rationale. While Montana is totally committed to making the necessary systemic changes to ensure significant increases in employment outcomes for persons with severe disabilities, the fiscal resources needed to actualize this change within the system currently are lacking. It is recognized that there are significant start-up costs associated with the
restructuring of service delivery that will lead to the anticipated employment outcomes (Hill, Hill, Wehman, Revell, Dickerson, & Noble, 1986). Additionally, technical assistance will be a necessary requirement for many service agencies in their efforts to reallocate resources and adopt supported employment practices. Fifield and Smith (1985, p. 38) suggest that:

The greatest amount of change in the adult delivery system might be realized from increased support and commitment from state and local governing bodies. Probably the most effective program development activities to be engaged in at this time are those which encourage individual states and local communities to support programs for adults with developmental disabilities. Only when such support is secured will states and communities be in control of the programs they offer. Furthermore, it is generally easier to change and upgrade small locally supported programs and to keep them abreast of current technology than it is to change federally sponsored programs.

**Anticipated Outcomes and Impact.** The MSED Project plans to annually commit $100,000 of project funds to contract with local service agencies and employers for initial start-up costs required to develop and implement supported employment practices. These one-time contracts will be awarded competitively according to a specified application process. Each year, 25% of these funds will be earmarked for employers to develop supported employment programs cooperatively with community service agencies.
The injection of funds into the service system, along with the specialized technical assistance that will be available from MSED Project and Demonstration and Training Centers' staff, is expected to provide the significant inducement necessary for large-scale system-wide service delivery change as it affects employment for persons with severe disabilities. The MSED Project anticipates that this catalyst for change will establish a solid foundation for lasting improvements in the system that will ensure that persons with severe disabilities continue to receive equal opportunity for employment.

**Objective 7:** By September 30, 1991, establish system processes between secondary special/vocational education programs and the adult service system that facilitate the transition of students with severe disabilities from school to supported employment.

**Rationale.** In Montana's school systems, like most school systems in this country, severely disabled students are not routinely guided into employment opportunities when they exit school. In the absence of systematically planned transition to employment from school, it is not surprising that the unemployment rate for individuals with severe
disabilities is as high as it is (Wehman, Kregel, & Barcus, 1985).

**Anticipated Outcomes and Impact.** The MSED Project will work in concert with school programs and community-based services to develop integrated service delivery systems that provide functional skill development for students with severe disabilities that are linked to employment with support in the community after high school. To accomplish this outcome, the MSED Project will participate in the existing interagency commitment to statewide transition efforts. Further, fiscal and technical assistance will be provided to educational agencies to support the development of programs that specifically target supported employment outcomes that are coordinated with community-based adult services. The resulting movement of youth with severe disabilities directly from school to supported work situations is expected to significantly reduce the waiting list for community-based adult services that has grown steadily every year.

**Objective 8:** By September 30, 1991, establish interagency agreements and fiscal resources necessary and sufficient to sustain a statewide system of supported employment options for persons with severe disabilities.
Rationale. Attention to public policy is a key to accomplishing statewide systemic change in employment services for persons with severe disabilities (O'Neill & Stern, 1985). Many potential obstacles need to be identified and resolved if the systemic change is going to work (University of Kentucky Affiliated Program, 1985).

Anticipated Outcomes and Impact. The MSED Project has received support for the development of a statewide system of supported employment for persons with severe disabilities from a wide array of constituents. Former Governor Ted Schwinden, in his letter endorsing the project, notes that the state currently funds several supported employment programs. In offering the cooperation of the executive branch agencies to the project he points out that through the MSED Project "Montana could get a real head start in putting the supported work model in place." Developing and implementing the MSED Project will involve the direct cooperation and participation of all state agencies having responsibility for making the necessary changes for establishing the statewide system of supported employment for persons with severe disabilities. The Project staff will work with these agencies to adapt existing rules, regulations, policies, and funding mechanisms to sustain the systemic changes necessary to achieve the anticipated outcomes.
Given these anticipated outcomes relative to the objectives of the MSED Project, the following chapter will describe two things. One, outcomes that can be directly attributed to the grant activities will be cited. Two, those outcomes which have a causal relationship to the grant, but cannot be directly assigned to it, will also be included. The nature of the statewide impact the MSED Project has had on the service delivery system, and the rippling effects which have resulted, justify this approach in the final analysis.
Chapter IV. RESULTS AND ANALYSIS

As mentioned in the previous chapter, the MSED Project had a primary goal and eight principle objectives which acted as a guide in the implementation of the state systems change grant, and the standard by which to measure the Project's success. The goal and objectives are listed in this chapter along with the evaluative methods used to measure whether each was met. A narrative follows each objective that describes the outcomes to date relative to it.

Goal
Goal Statement: By 1992, 60% of adult Montanans with severe disabilities are employed and retained in integrated work settings.

The Supported Employment Reporting System (SERS) of the MSED Project is a data base which was utilized to acquire some of the necessary information for evaluation. SERS collected a variety of data from providers of supported employment services across Montana over the past four years. Information was received monthly on the types of service models, number of consumers receiving supported employment services, types of supported employment services provided, number of consumers employed in supported jobs, hourly
wages, hours worked, types of employment, types of benefits received, etc..

The Demographic Study of Supported Employment in Montana (Offner, Arnold & Wittekiend, 1988) and the Demographic Study of Supported Employment In Montana (Offner & Seekins, 1990) are two sources of information also used in this objective's evaluation.

Outcome to date: The MSED Project's original application for funding that was submitted in August, 1986, estimated that 112 Montanans with severe disabilities were engaged in supported employment at that time. In a demographic study of supported employment and vocational rehabilitation needs in the state, funded by the MSED Project in FY 1988 and conducted by the Montana University Affiliated Program at the University of Montana (Offner, Arnold, & Wittekeind, 1988), 262 individuals engaged in supported employment were identified. This represents a 134 percent increase over the first two years of the Project.

In their study, Offner, et al. (1988) surveyed the extant community-based service system for persons with disabilities in the state, including developmental disabilities, mental health, and rehabilitation, to determine the number of persons with severe disabilities who were being served or
were on waiting lists for services, the number who were considered by the service agencies to be appropriate for supported employment, and the number who were actually employed in a supported job. Within the community-based service system, 3,695 individuals with severe disabilities were identified, with 20 percent (746) being deemed by the service providers to be appropriate for supported employment. With 262 of these individuals currently employed in supported jobs at the time of the survey, an estimated 35 percent of the community-based service population that was appropriate for supported employment was employed as of August, 1988.

In a follow-up study done in 1990 by Offner & Seekins, a total of 380 persons with severe disabilities were working in supported employment. This figure falls short of the MSED Project's goal that by 1992, 60% of adult Montanans with severe disabilities are employed and retained in integrated work settings, with 51% of the population obtaining supported employment.

There are factors to consider which influence the outcome of this goal. One, the final numbers are not counted relative to the number of people presently working in supported employment. Compilation of the data will not be completed until January, 1992. Second, the economy statewide is in a
slump. Unemployment rates were relatively high since the beginning of the MSED Project, currently averaging 5.8% statewide. Competition, then, was and remains keen for entry and mid level jobs which become available.

Objectives

Objective 1: By September 30, 1991, increase the capability of professionals in Montana's service system to provide supported employment opportunities for persons with severe disabilities by developing and delivering a competency based supported employment training program to 75 persons.

The Training and Technical Assistance Log (TTAL) of the MSED Project was the document reviewed to obtain the necessary data for evaluation. The TTAL is a data base which was designed to store all training and technical assistance provided by the MSED Project. The TTAL describes the topic of training delivered (supported employment services, state human service system, family involvement, employer/co-worker roles, advocacy, training techniques, funding sources, etc.), the mode of delivery (conference, workshop, inservice presentation, on-site consulting, etc.), the background of the audience (consumer, state agency staff, service provider staff, family member, teacher, employer, etc.), the number
of people receiving training and technical assistance, and the amount of time spent delivering the training and technical assistance.

**Outcome to date:** From 1988 to 1991, a total of 103 professionals were trained in a competency based curricula on the delivery of supported employment services. Offered annually, each session lasted five full days, and the professionals graduated from the training with competencies needed in order to act as job coaches who provided supported employment services to people with severe disabilities.

The curriculum was developed by MSED Project staff, and provided training on the following topics of normalization, community integration, supported employment models, the referral process, consumer assessment, marketing, job development, job analysis, job placement, on the job training, job site fading, follow along services, advocacy, and quality assurance.

**Objective 2:** By September 30, 1991, demonstrate three distinct approaches to supported employment that are appropriate for Montana's service delivery challenges.
The MSED Project contracted on an annual basis with two providers of supported employment services to act as demonstration and training centers for the Project. Part of their responsibilities included demonstrating different models of service delivery relative to supported employment, and then to provide the necessary training and technical assistance to other providers around the state who were interested in duplicating those models. The demonstration and training centers were required to report quarterly on activities they were engaged in, and these reports have also served as resources for evaluating this particular objective.

A Request For Proposals (RFP) process was developed by the MSED Project for the purposes of providing supported employment stimulation funding, demonstrating various models of service delivery, and opportunities for delivering training and technical assistance to the various players in the service delivery system. Documentation of the RFP process was also used to evaluate this objective.

The Supported Employment Employer and Client Satisfaction Survey (Offner & Seekins, 1991) was used to establish perceptions of supported employees and employers relative to the success of supported employment outcomes resulting from the efforts of the MSED Project. The survey was sent to
service providers who had consumers participating in supported employment in 1991. The surveys were completed during the months of February, March and April 1991. Job coaches working for the service providers were asked to coordinate and gather the information since they were most familiar with both consumers and their employers. It was left to the job coaches to determine the most appropriate method of delivery and survey completion of each group. The job coaches were also asked to group responses from employers with the responses of their employees for the purpose of comparing responses from both views (Appendix B).

**Outcome to date:** During the course of the MSED Project, four models of supported employment were demonstrated in various communities around the state. They were the:

* individual placement model;
* enclave model;
* mobile work crew; and
* entrepreneurial model.

In 1990, of a total of 280 people with developmental disabilities in supported employment, 238 (85%) were employed in the individual model; 11 (4%) were employed in the enclave model; 27 (10%) were employed in the mobile work crew model; and 4 (1%) were employed in the entrepreneurial
model. It was found that in most instances, the individual placement model of supported employment was viewed as the least restrictive alternative. Higher wages paid by the employer were characteristic of the individual placement model. Since the supported employee is individually placed, and not working within a small group of employees with disabilities, the opportunity for high quality integration was far more probable. In most cases, enclaves, mobile work crews, and the entrepreneurial model were designed to serve consumers with more intensive needs.

Figure 2 - Montanans with Developmental Disabilities in Supported Employment in 1990
Individuals who exhibited challenging behaviors which warranted consistent intervention or individuals with extremely low skill levels were good candidates for these group models. Once workers with intensive needs gain valuable work experience from enclaves and/or mobile work crews, it may be possible for them to move into the individual placement model of supported employment. Each agency's goal should be to promote positive movement from enclaves and mobile work crews into individual placement when possible. Models of supported employment often offer increased wages, benefits, and integration opportunities leading to an enhanced quality of life. In addition, providing an array of supported employment options further ensures that individuals with the most severe disabilities will not be excluded from participating in community, integrated employment.

Results from the satisfaction survey by Offner & Seekins (1991) showed that of the 187 supported employees interviewed, 185 (99%) responded that they liked working in regular jobs. The same number of employees indicated they felt they did a good job in their present positions. There were 172 "yes" responses (92%) to the question, "Do you like this job?".
Supported employees who were able to communicate verbally offered comments such as, "I am proud.", "It's my life!", "I like the money!", "I know my job and do it well."
. These, paired with the positive results of the survey questions, suggest supported employment is extremely successful from the supported employees' perspectives.

Objective 3: By September 30, 1991, increase employer participation in the supported employment of persons with severe disabilities by 200%.

The Supported Employment Reporting System (SERS) of the MSED Project is a data base which was utilized to acquire the necessary information for evaluation. SERS collected a variety of data from providers of supported employment services across Montana over the past four years. Information was received monthly on the types of service models, number of consumers receiving supported employment services, types of supported employment services provided, number of consumers employed in supported jobs, hourly wages, hours worked, types of employment, types of benefits received, etc..

Additionally, documentation of the RFP process was used to evaluate this objective.
The Supported Employment Employer and Client Satisfaction Survey (Offner & Seekins, 1991) also was used to establish perceptions of employers relative to the success of supported employment outcomes resulting from the efforts of the MSED Project.

Outcome to date: In 1986, prior to the MSED Project, there were 48 employers in Montana who were involved in the hiring of people in supported employment. Offner & Seekins (1990) surveyed 38 providers of supported employment services, and determined 284 employers had hired persons with severe disabilities in supported positions statewide.

Annually, the MSED Project earmarked grant funds for employer initiated innovation and development programs that would reduce barriers to employment of persons with severe disabilities, replicate model hiring and training practices, integrate persons with severe disabilities with non-disabled co-workers, or establish partnerships between employers and public/private non-profit vocational services. Two employer-initiated projects totalling $28,044 were awarded in FY 88 which resulted in 12 persons being placed in supported jobs; two employer-initiated projects totalling $20,000 were awarded in FY 89 which resulted in seven persons being placed in supported jobs; and four employer-
initiated projects for $50,000 were awarded in FY 90 which resulted in 12 persons being placed in supported jobs.

The satisfaction survey by Offner & Seekins (1991) indicated employers were as pleased with their supported employees as were the supported employees were with their jobs. There were 136 employers who responded to six questions. Nearly half indicated they were concerned or doubtful about supported employment prior to hiring their first supported employee. However, 129 (95%) said they would hire another supported employee in the future. When asked whether they would encourage other employers to hire supported employees, 131 (96%) said yes. Finally, the employers rated their supported employees' overall job performance. There were 78 employers (42%) that gave an above average rating, 98 (52%) that gave an average rating, and 12 (6%) who gave a below average rating. Some of the overwhelmingly positive comments made by the employers included:

* Best employees we can count on! Have had high turnover in entry level jobs before.

* Hardest worker we have.

* Very reliable.
* My supported employees are the most motivated employees I have!

* Great program! Gives employees self esteem.

Objective 4: By September 30, 1991, establish a single point of access (SPA) in five communities to employment services for persons with severe disabilities that provides effective case management leading to employment outcomes.

Outcome to date: A primary feature of Montana's supported employment system, developed through the efforts of the MSED Project, is a single point of access (SPA) that allows an individual with a severe disability or his/her family to reliably and effectively manage the array of services needed to actualize an employment outcome. The SPA operates as an interagency liaison, managed by the State Rehabilitative Services Division, to promote coordination and cooperation between service agencies and professionals. The SPA works to ensure that resources are effectively managed to ensure that each consumer progresses to maximum self-sufficiency in the least restrictive environment. Services coordination within the SPA focuses on making sure all appropriate community resources are available to meet the consumer's needs. The SPAs are located in nine community regions.
across the state and are fully functioning in their responsibilities.

Objective 5: By September 30, 1991, inform consumers, parents, professionals, employers, and others about the nature and purpose of supported employment for persons with severe disabilities through a minimum of ten statewide educational events.

The Training and Technical Assistance Log (TTAL) of the MSED Project was the document reviewed to obtain the necessary data for evaluation.

Outcome to date: From March, 1987 through the second quarter of FY 91, a total of 11,119 people (duplicated count) had received some sort of training or technical assistance, which took 2618 hours of delivery time, as a result of the MSED Project. The topics of training/technical assistance delivered included describing what supported employment services were, the state human service system, family involvement, employer/co-worker roles, advocacy, training techniques, funding sources, etc.. The mode of delivery included annual conferences, workshops, inservice presentations, on-site consulting, etc.. The background of the audiences were consumers, state agency
staff, service provider staff, family members, teachers, employers, etc..

A total of 42 statewide workshops and five annual statewide conferences on supported employment were sponsored by the MSED Project during the Project life.

Objective 6: By September 30, 1991, provide fiscal and technical assistance to facilitate the development and implementation of supported employment practices within Montana’s service system for persons with severe disabilities through four rounds of supported employment start-up grant cycles.

The Training and Technical Assistance Log (TTAL) of the MSED Project was a document reviewed to obtain some of the necessary data for evaluation.

Documentation of the RFP process was also used to evaluate this objective.

Outcome to date: Annually, the MSED Project budgeted a minimum of $100,000 of Project funds to support small contracts with service providers and employers to provide one time start-up costs for supported employment practices,
of which 25% of these funds were earmarked for employer initiated proposals. These contracts were awarded on a competitive basis. In FY 88, a total of $145,000 was awarded to eight different grant projects, which resulted in 44 persons with severe disabilities obtaining employment. In FY 89, $125,000 was awarded to eight grant projects, resulting in supported employment for 50 persons with severe disabilities. In FY 90, $105,000 was awarded to seven grant projects, resulting in 29 people with severe disabilities gaining supported employment. In FY 91, $100,000 was awarded to two projects, resulting in eight persons with severe disabilities obtaining supported employment.

Each of the grant projects funded were assigned to one of the two demonstration and training centers of the MSED Project for the purpose of receiving training and technical assistance relative to the project. Quarterly on-site visits to the grant projects were conducted by demonstration and training center staff. In addition, the MSED Project sponsored formal training events (workshops, seminars, in-services) which staff from the grant projects attended. Cumulative data generated in the training and technical assistance data base is reported under Objective Five, and includes training and technical assistance provided to the grant projects funded under the supported employment startup grant cycles.
Objective 7: By September 30, 1991, establish system processes between secondary special/vocational education programs and the adult service system that facilitate the transition of students with severe disabilities from school to supported employment.

The Training and Technical Assistance Log (TTAL) of the MSED Project was the document reviewed to obtain the necessary data for evaluation.

Outcome to date: Annually, approximately 80 people with severe disabilities age out of school in Montana, usually ending up on waiting lists for community based services. The MSED Project established linkages with secondary special/vocational education programs to provide technical assistance in developing supported employment transition programs. In Montana's school systems, like most school systems in this country, students with severe disabilities are not routinely guided into employment opportunities when they exit school. The absence of a systematic planned transition to employment from school contributes to the state's high rate of unemployment for people with severe disabilities. The MSED Project worked in concert with school programs and service providers to develop integrated...
service delivery systems which provided functional skill development for students with severe disabilities that were linked to supported employment in the community after high school. In order to facilitate the transition of students with severe disabilities from school to supported employment, the MSED Project worked with the State Office of Public Instruction and state administering agencies for adult services to draft an interagency transition planning process that included the following components:

* **Interagency Transitional Plan:** A comprehensive, longitudinal written plan that specifies the skills to be acquired by the student who will be exiting from school in three to five years, and the transition services to be received prior to and following graduation. The plan includes annual goals and short term objectives that reflect skills required to function on the job, at home, and in the community. Transition services should be specified, including referral to appropriate agencies, job placement, and job follow-up.

* **Interagency Transitional Plan Meeting:** A forum for the different agency representatives to develop plans of long term service provision for
graduating students. Each agency representative assumes responsibility for referral to and delivery of the various services that will be required for an effective transition from school to work. Members of the Interagency Transitional Planning Team may include:

- Student,
- Parent/Guardian/Primary Caregiver,
- Vocational Rehabilitation Staff,
- Disability Case Manager,
- Funding Agency Staff,
- School’s Vocational Instructor,
- Special/Vocational Education Instructor,
- Adult Service Provider Representative, and
- School Support Staff.

To educate school and community personnel on the transition issues, the MSED Project developed and conducted three workshops, and funded two school to work model grant projects for the purposes of completing and disseminating documentation of the transition model.

Objective 8: By September 30, 1991, establish interagency agreements and fiscal resources necessary and sufficient to sustain a statewide system of
supported employment options for persons with severe disabilities.

Outcome to date: Attention to public policy in the development of a statewide system of supported employment for Montana was a major concern of the MSED Project. Responsibility and authority for development of supported employment services involves many agencies. In Montana, the players included the Department of Social and Rehabilitation Services, the Department of Institutions, the Department of Labor, and the Office of Public Instruction. Although any of these agencies may have provided the primary leadership, it was critical that all roles be clearly identified. It was felt a clear division and coordination of responsibilities among agencies operate to the benefit of the service providers. Interagency agreements are necessary to identify the role of each agency and the type of coordination needed. These agreements can prevent duplication of effort, establish funding for supported employment services, and identify who will provide what services.

Public policy issues needed to be addressed. Comprehensive state plans were needed to coordinate effective use of resources to address existing barriers and ensure systematic implementation of supported employment in Montana. State
statutes, regulations, and policy were needed to permit and promote widespread development of supported employment. Clear statements of agencies' responsibilities, the development of statewide supported employment plans, and attention to state level laws and regulations removed barriers and thus facilitated the development of innovative employment options in communities.

In 1990, three interagency agreements were developed and signed into effect. They consisted of agreements between:

* Department of Institutions and the Department of Social and Rehabilitation Services, for the purpose of developing a clearly coordinated and defined systematic approach to the development and maintenance of vocational rehabilitation services in Montana that created income producing work opportunities in integrated community settings for individuals with severe mental illness (Appendix C);

* Office of Public Instruction and the Department of Social and Rehabilitation Services, for the purpose of providing an array of meaningful postschool employment and residential alternatives for students with severe disabilities (Appendix D); and
Developmental Disabilities Division and the Rehabilitative/Visual Services Divisions of the Department of Social and Rehabilitation Services, for the purpose developing a clearly coordinated and defined systematic approach to the development and maintenance of supported employment services in Montana (Appendix E).

In 1991, an interagency agreement was developed which combined the previous agreements under one document so that a more unified and coordinated governing document would exist. Parties to the agreement were the Department of Institutions, the Department of Social and Rehabilitation Services, Office of Public Instruction, and the Department of Labor and Industries. The purpose of this mega-agreement is to facilitate the provision of services for persons with severe disabilities, to establish principles and procedures for integrated, unduplicated services to those served by the agencies in agreement, to foster the development and implementation of supported employment services in Montana which create opportunities for work in integrated community settings for people with severe disabilities, and, because vocation and income producing work are important in the development of persons with severe disabilities, to share responsibility for creating an integrated system of services.
leading to the empowerment of consumers with severe disabilities (Appendix F).

An annual budget of $1,226,564 has been earmarked for supported employment services statewide for people with severe disabilities since the inception of the MSED Project. Federal and state funding of $893,000 is administered through the Rehabilitative Services Division of the Department of Social and Rehabilitation Services, and $333,564 administered through the Developmental Disabilities Division of the Department of Social and Rehabilitation Services, and the Department of Institutions.
Chapter V. CONCLUSIONS AND RECOMMENDATIONS

Based on the data collected and the documentation reviewed, the eight primary objectives of the MSED Project were met successfully. The service system made changes in order for people with severe disabilities to receive the necessary services such that they could become employed and stay employed. What became apparent in the evaluative process is that much still needs to be done if all people who want supported employment in the State of Montana will be able to access needed services.

Individuals with severe disabilities can continue to obtain and maintain paid, meaningful, integrated employment in their own communities, if the system changes initiated by the MSED Project and the cooperating agencies continue. In order for this progression to occur, several issues need to be resolved.

The following options are offered that may enhance the likelihood of Montanans with disabilities obtaining and maintaining employment. The options are presented according to the policy objectives that they are designed to achieve.
Improve the integration and coordination of programs so that the system of services operates in a unified and consistent way.

Some persons need several services simultaneously. Some workers with disabilities have intermittent periods of eligibility and need for benefits or services. The system of services will become more effective and less costly if it operates in a more unified fashion, and can reduce the resistance to change within the system. Another possible outcome under this option is the potential of developing a unified system for determining eligibility across programs. This could reduce costs as multiple determinations of eligibility for different programs are consolidated into a single determination. It would also assure that consumers are given the benefit of all available services they may need.

Increase Resources for Supported Employment Training.

Job coaches who are well trained and who can train consumers to meet specific job requirements are crucial to the success of supported employment. Turnover rates of job coaches can be high. When a job coach leaves, it creates an immediate crisis because of the small number of staff any one service provider has, or has access to in the hiring process in our
rural state. Increased incentives, training and pay for job coaches would likely encourage job coaches to stay with the service providers longer. Additional training in interagency referral procedures is also needed for all involved in the delivery of supported employment services. These same players need more preparation in consumer planning and monitoring quality standards of supported employment.

Improve Transition Services, Coordination and Funding with Schools.

More special education students are in high school than ever before. The State Department of Social and Rehabilitation Services is compelled to handle increased numbers of applications for services for consumers transitioning from high school to the adult community. Many high schools are converting to a community based work curricula for high school students with severe disabilities. When these students graduate, vocational rehabilitation services must be ready to provide or continue employment services so that these individuals can obtain and maintain employment. Better coordination between adult service providers, state agency staff, families and teachers is essential to maximize educational, rehabilitation and employment opportunities for
students with severe disabilities as they transition to the employment world.

Expand the service system so that long term vocational services are available to persons with severe disabilities who require these services.

A source of financing is needed to support vocational activities by community service providers established to produce long term services for persons with severe disabilities. A wide range of diversified employment programs could then be developed, or in some cases, continued. Current state laws do not mandate long term services for all adults with disabilities. Persons with physical disabilities, traumatic brain injuries, blindness or deafness may find themselves excluded once they complete high school. Both state and federal funds must be secured to expand supported employment to all adults who could benefit.

Improve the Partnership with Employers.

New breakthroughs can be made to create integrated job opportunities for consumers with severe disabilities, and at the same time address employers' needs for a labor force. Private businesses, particularly in the service sector of
the economy, such as restaurants, hotels, and retail, have readily embraced the concept of supported employment. Other sectors, such as public agencies, have been slower to adapt. The challenge is to open up and diversify the types of jobs and employers to enable people with the most severe disabilities to have the opportunity to become employed.

**Summary and Conclusion**

The adoption of options like the ones described would not be all that difficult. Many programs already exist to serve persons with disabilities. What is needed is reorientation of the system toward work, and better coordination among existing programs. The major current gap is the lack of funding to support long term vocational services.

These options really are not a major departure from the current system. It does seem that the costs of providing services needed to sustain persons with severe disabilities in gainful employment will exceed the wages they earn. What needs to occur is a benefit-cost analysis of the employment program compared with a similar analysis without it. Implementation of the options mentioned should reduce the costs that society incurs as a result of a disability. They would assist people who are totally dependent on income support and health care programs to become partially or totally independent, thus reducing costs.
Creating a system of services that is fully effective takes time. Legislators and program administrators would likely have concerns about these new approaches. They represent a change in current program philosophies and services. Changing the attitudes of the public and professionals about the employability of persons with disabilities is a lengthy process.

Supported employment appears to be demonstrating solid success in the competitive placement of individuals with severe disabilities. The researchers claim that whether such services should be provided is no longer at issue, and their claim evokes little argument. They see the future challenge as one of developing effective interagency agreements and cooperative funding mechanisms by which to implement such programs as quickly and efficiently as possible.
REFERENCES


N. Certo (Eds.), Educational programming for the severely and profoundly handicapped, (pp. 129-141). Reston, VA: Council for Exceptional Children, Division on Mental Retardation.


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EMPLOYER SATISFACTION SURVEY

This survey is divided into two sections. The first section has questions related to the supported employment program in general and the second section has questions related to your supported employees. Please complete the questions in the second section for each supported worker you employ.

1) Regarding supported employment services:

Were you concerned or doubtful about supported employment prior to hiring your first supported employee? yes ___ no ___

Would you hire supported workers in the future? yes ___ no ___
If no, why? .................................................................................................................................

Would you encourage other employers to hire supported workers? yes ___ no ___
If no, why? .................................................................................................................................

2) Regarding your supported worker(s):

Do you feel support services for your employee(s) are adequate? yes ___ no ___
If no, why? .................................................................................................................................

Has this employee made a positive contribution to your organization?

Employee 1  Employee 2  Employee 3  Employee 4

yes

no

How would you rate the employee overall?

Employee 1  Employee 2  Employee 3  Employee 4

above average

average

below average

3) Please feel free to make any comments here about supported employment and supported employees. Your input will be helpful and greatly appreciated.

NOTE: If there are more than four employees with an employer, please continue with additional surveys and number accordingly.
SUPPORTED WORKER SATISFACTION SURVEY

1) Do you like working in a regular job? yes ___ no ___

2) Do you feel you do a good job? yes ___ no ___

3) Do you like this job? yes ___ no ___
   If no, why? ____________________________________________________________

4) Please make any comments you would like about your job here.

Thank you for your help with this survey.
Interagency Agreement
between the
Department of Institutions
Treatment Services Division
and the
Department of Social and Rehabilitation Services
Rehabilitative/Visual Services Divisions
FFY 1990

I. PARTIES

The parties to this agreement are the Department of Institutions Treatment Services Division, hereinafter referred to as D of I., and the Department of Social and Rehabilitation Services Rehabilitative/Visual Services Divisions hereinafter referred to as SRS/VR.

II. PURPOSE

SRS/VR and D of I enter into this agreement for the purpose of developing a clearly coordinated and defined systematic approach to the development and maintenance of vocational rehabilitation services in Montana. Among the goals of this statewide system is the creation of income producing work opportunities in integrated community settings for individuals with severe mental illness.

III. ELIGIBILITY FOR SERVICES

SRS/VR has been established to assist in the vocational rehabilitation of persons with physical and mental disabilities. Responsibility for determining eligibility of persons with disabilities wishing to access services from either SRS/VR or D of I rests solely with each prospective agency. The criteria for eligibility for vocational rehabilitation are:

A. The presence of a physical or mental disability which, for the person, constitutes or results in a substantial handicap to employment; and

B. A reasonable expectation that vocational rehabilitation services may substantially benefit the person in terms of employability.

D of I has been established to fund, set standards for, and evaluate local mental health programs and to supervise and administer the state mental health institutions. Persons with severe mental illness may be served by the Montana State Hospital, the Center for the Aged, or community-based mental health centers. The services provided or purchased by D of I are based upon priorities set through the mental health planning process. The services are provided based on funding.
IV. AGREEMENT

The parties agree to work together as specified herein to insure availability of appropriate services for persons with severe disabilities due to mental illness.

Both parties agree to cooperatively provide comprehensive and effective services for people with severe mental illness. SRS/VR and the D of I recognize that the provision of needed services is dependent upon the development of joint planning and cooperative efforts.

The parties recognize that no single pattern for cooperative effort can be effective everywhere. With clients for whom D of I and SRS/VR share responsibility, both parties agree that D of I will provide mental health services and SRS/VR will provide services that are needed to facilitate vocational outcomes. The precise role of each agency in a given geographical area will depend upon the resources available to both agencies and upon the particular needs of the client.

A. Each agency will assign a staff member to act as a liaison between the two agencies.

B. Planning will occur around shared vendor services to persons with severe mental illness, and this planning will result in an annual joint agency plan of vocational rehabilitation services.

C. Montana State Hospital will house a SRS/VR Counselor to facilitate rapid vocational rehabilitation referrals and to aid in pre-release planning.

D. The Disability Determination Bureau of SRS/VR and D of I will work closely with the Social Security Office to:
   1. Provide for rapid certification of Supplemental Security Income recipients; and
   2. Study ways and means of more efficient case-finding for persons with severe mental illness in Montana.

E. Each agency will encourage and support cooperative efforts in short-term and long-term training of direct service staff. They will collaborate in performing utilization studies of rehabilitation and mental health services/manpower.

F. Both agencies will collaborate in seeking additional sources of funding for services to persons with severe mental disabilities.

G. Both agencies will confer regarding changes in the setting of reimbursement rates for services to persons with severe mental illness.

H. The administrators of D of I and SRS/VR will meet at least once annually to review progress being made in carrying out the provisions of this agreement, and to discuss other matters of mutual concern to their agencies and constituencies.

I. The rules and policies of each agency shall govern questions of confidentiality.

J. D of I will encourage mental health centers to develop vocationally oriented services which complement, but do not duplicate, services provided by vocational rehabilitation providers.

K. D of I and SRS/VR will investigate the feasibility and desirability of using general funds appropriated by D of I as vocational rehabilitation state match to provide additional federal funding of vocational services for persons with severe mental illness.
V. AGREEMENT FOR SUPPORTED EMPLOYMENT PROGRAMS

It is agreed that the SRS/VR and D of I will combine efforts and resources, including the Montana Supported Employment Demonstration (MSED) Project, to develop and maintain a statewide system of vocational rehabilitation, which will include supported employment, in integrated settings for persons with severe mental illness. Severely disabled employees participating in supported employment through contracted service providers, must be:

a) engaged in part-time or full-time employment which pays real wages and benefits commensurate with the person's ability to achieve goals or render services, and is based on current competitive rates in integrated work settings;

b) provided with ongoing support and services necessary to maintain employment; and

c) provided with normative cultural opportunities in the least restrictive, most integrated environment possible.

The models of supported employment recognized under this agreement will be those models that meet the following criteria:

a) capable of providing 20+ hours per week;

b) capable of competitive or minimum + wages; and

c) integrated in the community as per Appendix A.

The common feature of all models of supported employment is that the individual is paid by an employer other than the supported employment provider, or there is a direct employer/employee relationship, as in crews and enclaves.

Vocational Rehabilitation funding available for eligible persons with severe mental illness will be used for supported employment. Eligibility is defined as services to persons who have severe disabilities; and

a) for whom competitive employment has not traditionally occurred or has been interrupted or intermittent as a result of those disabilities; and

b) who has been determined by an evaluation of rehabilitation potential to have:

1. the ability or potential to engage in a training program leading to supported employment;

2. a need for on-going support services in order to perform competitive work; and

3. the ability to work in a supported employment setting.

Definitions of "supported employment," "competitive employment," and "integrated work setting" appear in Appendix A of this agreement.
A. The Vocational Rehabilitation Program Agrees To:

1. Provide VR funds where appropriate and available to eligible persons with severe mental disabilities.

2. Maintain a single point of access (SPA) to supported employment programs statewide as jointly defined by SRS/VR and D of I through the MSED Project and in conjunction with administration of other SRS/VR and D of I programs.

3. Coordinate data taking efforts to determine the effectiveness of work services for the persons served. Provider agencies receiving funds from SRS/VR, and MSED will be required to participate in the supported employment reporting system (SERS) data gathering efforts.

4. Develop an individualized written rehabilitation plan (IWRP) in coordination with the designated case manager. Specific measurable outcomes will be included in the IWRP document. This document will be included in the case management file.

5. Provide opportunities for training and technical assistance to providers and administrative staff in supported employment services.

6. Pursue further regulatory accommodation to achieve a consumer oriented supported employment program.

7. Evaluate and revise as needed the system for access to SRS/VR funds (refer to Appendix B).

8. Adopt as a goal in common with D of I, the development of a system that guarantees ongoing support for all individuals placed through its activities.

B. The Department of Institutions Agrees To:

1. Participate in the MSED supported employment activities in Montana as designated by this agreement.

2. Work with SRS/VR in the development of long term funding options for supported employment.

3. Continue efforts through the legislative and budget processes to expand appropriate supported employment services for Montanans with severe disabilities.

4. Meet with SRS/VR staff on a regular basis to share program information and discuss significant program concerns.

5. Provide long term extended service funding within existing resources to eligible individuals.

6. Work with SRS/VR staff and individual service providers to encourage the development of integrated competitive work settings as an alternative to centerbased day treatment resources.

C. Both Parties Agree To:

1. Work cooperatively in all levels of development of the supported work service system, including reallocation of existing resources to conform to the highest level of services in supported employment.

2. Participate in the SPA as negotiated.

3. Investigate increased long term funding alternatives for individuals who may meet eligibility criteria but are currently not funded by D of I.
4. Prior to supported employment activities, coordinate part time and short term placements into extended employment or work adjustment training when appropriate to support the individual.

5. Document annual cost of services for 1990, including time limited services and extended services expenditures.

6. Evaluate and revise, as needed, criteria and procedure for transitioning from SRS/VR funded services to D of I funded services. This process includes the joint determination by both divisions that the individual has been stabilized in the employment setting and that change in funding is appropriate for each person. This process is included under Appendix C.

7. Maintain the vendor system for supported employment currently in operation in Montana.

8. Develop a joint strategy for expanding the vendor system for supported employment during this biennium.

9. As part of the 1990 Executive Planning Process the Administrators of the Rehabilitative/Visual Services Divisions of SRS and the Treatment Services Division of the D of I will meet to discuss the financial and program viability of selecting a national accreditation organization for vocational services vended by the five regional mental health programs to the Rehabilitative/Visual Services Divisions. By October 1, 1991 the D of I will have selected and committed to standards for supported employment programs which are acceptable to SRS.

10. Maintain access to appeal by consumers and other parties involved in supported employment services.

11. Provide cross training, technical and consultative services between the two agencies' staff regarding eligibility requirements, case management, service availability, and service delivery of each respective agency.

VI. SERVICE GOALS AND COMMITMENTS FOR FEDERAL FISCAL YEAR 1990

The following lists represent the service goals of the SRS/VR Transitional Employment Services Unit.

<table>
<thead>
<tr>
<th>SERVICE PROVIDER</th>
<th>JOINT VENDOR</th>
<th>SERVICE CAPACITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMI</td>
<td>Eastern Montana MHC</td>
<td>3</td>
</tr>
<tr>
<td>Golden Triangle MHC</td>
<td>None</td>
<td>6</td>
</tr>
<tr>
<td>Job Connections, Inc.</td>
<td>Mental Health Center</td>
<td>8</td>
</tr>
<tr>
<td>Billings Workshop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mental Health Services, Inc.</td>
<td>None</td>
<td>8</td>
</tr>
<tr>
<td>River House</td>
<td>None</td>
<td>6</td>
</tr>
<tr>
<td>Flathead Industries</td>
<td>Lamplighter</td>
<td>3</td>
</tr>
</tbody>
</table>

SRS/VR has established, as a goal, the commitment of $130,100.00 towards time-limited training for 34 individuals with severe mental illness. The D of I commits the manpower and program resources necessary to offer continuing support to 34 new placements in program year 1990.

The listing of vendors and goals does not constitute a limit on actual vendors or numbers served in FFY 1990. Additional vendor applications will be considered in accordance with the stipulations addressed in Appendix B.
IV. EXECUTION AND MODIFICATION OF THIS AGREEMENT:

A. This agreement is effective October 1, 1989 and shall remain in effect until September 30, 1990, or until modified or terminated as stated below.

B. Either party may terminate or modify this agreement, in whole or in part, by submitting 30 days written notice to the other party.

APPROVED:

Julia Robinson, Director
Department of Social and Rehabilitation Services

Curt Chisholm, Director
Department of Institutions

Margaret Bullock, Administrator
Rehabilitative/Visual Services Divisions

Robert W. Anderson, Administrator
Treatment Services Division

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The Vocational Rehabilitation Program of Montana is bound by the following definitions and eligibility standards for supported employment programs.

**DEFINITIONS**

**Supported Employment:** competitive work in an integrated work setting for individuals who, because of their disability, need ongoing support services to perform that work. Supported employment is for individuals with severe disabilities for whom competitive employment has not traditionally occurred, or individuals for whom competitive employment has been interrupted or intermittent as the result of a severe disability; and transitional employment for individuals with severe mental illness.

**Competitive Employment:** work that is performed on a full-time basis, averaging at least 20 hours per week for each pay period, and for which an individual is compensated in accordance with the Fair Labor Standards Act.

**Integrated Work Setting:** job sites where:

1. Most co-workers are not disabled; and
2. Individuals with disabilities are not part of a work group of other individuals with disabilities; or

1. Most co-workers are not disabled; and
2. If (A)[2] is not possible, individuals with disabilities are part of a small work group of not more than eight individuals with disabilities; or

1. If there are no co-workers, or the only co-workers are members of a small work group of not more than eight individuals, all of whom have disabilities, the individuals with disabilities have regular contact with non-disabled individuals, other than personnel providing support services in the immediate work setting.

**Transitional Employment Services:** services provided by the facility job placement specialist or job coach that fall into one of the following categories of training activities:

**A. Job-Site Activities**

A1. Active - consumer and trainer at the job site; time in active training, observation and/or recording.

A2. Job Site Analysis - job coach at the job site learning the job for the purpose of conducting the task analysis leading to the job analysis report.

**B. Transition Activities**

B1. Employer Contact Time - time spent:
   * traveling to and from the employment site; and/or
   * advocating directly with the employer, supervisor or coworkers for the consumer.

B2. Consumer Training Time - time spent training the consumer, when not at the job site, in:
* public or private transportation use;
* money management, grooming and counseling; and
* program development; and
* worker support group.

B3. Advocacy Time - time spent advocating with persons (i.e., family members, medical doctors, case managers, Social Security) who directly affect the consumer's support system.

C. Daily Units of Service

C1. Crews and Enclaves - group models of supported employment.

C2. Transitional Placements - a training service provided on a daily unit basis for the primary purpose of allowing for a transitional work experience leading to either a permanent transitional or job placement outcome. The training service is regulated by the following conditions:

* an individual placement is restricted to 60 working shifts (approximately 3 months); and
* the transitional placement series is restricted to 120 working shifts (approximately 6 months).

Ongoing Support: continuous or periodic job skill training services provided at least twice monthly at the worksite throughout the term of employment to enable the individual to perform the work. Ongoing support also includes other support services provided at or away from the worksite such as counseling, personal care issues, medical issues, benefit issues, advocacy, employer/co-worker training, etc.

Individual Model: individual placement of an individual with a severe disability into integrated competitive employment with job coach support. This support is initially one to one at a high rate and gradually decreases as the worker becomes more proficient. Each employee works a minimum of 20 hours per week.

Mobile Crew Model: refers to the employment of a supervisor and a small group of individuals with severe disabilities (three to eight persons) who travel together to two or more worksites in the community, where they engage in contracted work. Each mobile crew employee works a minimum of 20 hours per week and is paid a commensurate wage.

Enclave Model: refers to the employment of an on-site supervisor and a small group of individuals with severe disabilities (three to eight persons) at an industry where they will work together within an integrated setting. The supervisor and/or the employees with severe disabilities may be employed by the industry or by an employment services program (human service provider). Each enclave employee will work a minimum of 20 hours per week, and is paid a commensurate wage.

Entrepreneurial Model: refers to a small business that is established in the community, and combines the functions of the support organization and the employer. The business is engaged in selling services and/or products.

Other: refers to other models of supported employment that meet the conditions of a 20+ hour work week, competitive or minimum + wages, and integration in the community.
APPENDIX B

VOCATIONAL REHABILITATION UTILIZATION PLAN

The Rehabilitation/Visual Services Divisions provide and purchases services in their mission of serving persons experiencing severe disabilities. Some of those services fall under the following headings:

Evaluation Services
1. Vocational Evaluation*
2. Vocational Assessment*
3. Job-Site Evaluation*
4. Supported Employment Job-Site Evaluation

Transitional Employment Services
1. Work Adjustment Training*
2. Transitional Placements
3. Transitional Employment Services (supported outcomes)
4. Transitional Employment Services (non-supported outcomes)
5. Extended Employment Programs (in-house or sheltered, and community based)*
6. Job Placement (all outcomes)

(NOTE: All the services listed above followed with an asterisk are purchased exclusively from the eight primary CARF accredited facilities listed below.)

Facility Providers

The three types of facility providers for the above services are:

* The Primary List of Providers.
* The Cooperative Expansion List of Providers, and
* The Unlisted Cooperative Providers.

The following is a description of the three types of facility providers.

The Primary List of Providers

The eight primary CARF accredited facilities are:

<table>
<thead>
<tr>
<th>Facility Providers</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billings Workshop</td>
<td>Billings</td>
</tr>
<tr>
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</tr>
<tr>
<td>Community Medical Center</td>
<td>Missoula</td>
</tr>
<tr>
<td>Eastern Montana Industries</td>
<td>Miles City</td>
</tr>
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</tr>
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These providers belong to the Primary List of Vocational Rehabilitation providers. They are distinguished by their capacity to provide an array of work oriented services to people experiencing disabilities leading to all three VR employment outcomes. Those outcomes are:

1. Competitive Employment
2. Sheltered Employment
3. Supported Employment

The Primary List of Providers is distinguished also in that the facility is not limited by definition or practice to serving a specific disability group or diagnosis.

The Cooperative Expansion List of Providers

VR has now expanded to include the following facility providers of services listed above that are not followed by an asterisk. This group of providers are called the Cooperative Expansion Facilities. They are characterized by being existing providers for agencies other than the Rehabilitative/Visual Services Divisions but from whom VR purchases services because of its cooperative agreement with those agencies. These facilities are currently covered under cooperative agreements with the Developmental Disabilities Division of Social and Rehabilitation Services and the Treatment Services Division of the Department of Institutions.

Eastern Montana Community Mental Health Center (Region I) Miles City
Golden Triangle Community Mental Health Center (Region II) Great Falls
Job Connection Inc. Billings
Mental Health Center (Region III) Billings
Mental Health Services Inc. (Region IV) Helena
Northern Gateway Enterprises Conrad
Reach Inc. Bozeman
Western Montana Community Mental Health Center (Region V) Missoula

The Rehabilitative Services/Visual Services Division is committed to the strengthening of programs being provided through the Primary Facilities and Cooperative Expansion Facilities. The recent Legislature provided little hope for additional funding or substantial increases. This means the possibility of any further expansion is unlikely for Section 110, Title VI Part C, or Extended Employment programs. Facilities on both lists are funded through fee-for-service set aside budgets. The two anticipated exceptions are the Job Placement Contracts ($120,000) and Extended Employment Conversion Contracts. Additional providers on the Cooperative Expansion List of Providers will be added if:

1. A need for service is described in terms of people experiencing severe disabilities who are appropriate and interested in transitional employment services.
2. VR has the capacity to purchase from the provider the threshold level of service required for the provider to maintain the effort for at least three projected years of service, or until the service need has been met; and

3. The applicant vendor can demonstrate the required service capacity in post VR extended services.

Unlisted Cooperative Providers

Providers who are not currently listed on the Cooperative Expansion List, but are providers for agencies with which Rehabilitation/Visual Services Divisions have a cooperative agreement may provide services to VR on a client-by-client basis if:

1. They can demonstrate an extended service capacity, and

2. VR transitional employment services funding is available.

Unlisted cooperative providers are not provided an annual set-aside budget level, but are assured of the commitment to serve the individual client to the conclusion of VR time-limited services.

True Service Capacity and Supported Employment

All providers of Transitional Employment Services will be required to demonstrate a service capacity in the provision of extended services (follow-along, or ongoing supported employment services) in order to receive a set-aside budget. The set-aside amount reflects the facility’s true service capacity up to a ceiling amount. In the quarter preceding Federal Program Year 1990 (July 1 through September 30, 1989), the Supported Employment Program Specialists approached each facility and discussed the facility's true service capacity in supported employment outcomes. True service capacity set-aside budget is the number of funded follow along slots multiplied by (x) the average cost per time-limited case for that disability group. If Primary or Cooperative Expansion Facilities cannot meet the amount of service capacity in their projected set-aside budgets, that unused portion will either:

1. Be used to establish a threshold budget for adding a new vendor to the Cooperative Expansion list. This will occur only if the unused funds are projected to be available over at least a three year period; or

2. Be used in a general district transitional employment services budget to purchase Transitional Employment Services from facilities on any of the three lists depending on client need.
APPENDIX C
TRANSITIONING FROM TIME-LIMITED SERVICES TO EXTENDED SERVICES

VR moves to case closure and transition when skill training has reached a stable level. Stability is reached when new skills or tasks are being learned or acquired by the consumer on the job site and the primary purpose for on-site intervention is skill maintenance. The threshold for consideration of transition occurs when:

* the job-site job coach or supervisory intervention hours fall at or below 20% of the average weekly hours worked by the consumer and remains at or below 20% for a minimum of 60 days;

* the job-site job coach or supervisory intervention hours have stabilized at or above 20% of the average weekly hours worked by the consumer and:
  1) remains at a stable level for a minimum of 60 days, and
  2) a successful transition to extended services is negotiated with the extended service provider, and

* all other off-site transition skill training activities (money management, grooming, transportation) have been adequately addressed in the transition plan to allow for a successful transfer of those responsibilities to the extended service provider.

A consumer's off-site personal management issues can postpone a closure when the "20% rule" has been met if those issues threaten the stability of the consumer's job and can reasonably be expected to be improved through time-limited job coach interventions.
Interagency Agreement For Transitional Services For Students With Disabilities
between the
Office of Public Instruction
and the
Department of Social and Rehabilitation Services
FFY 90

I. PURPOSE

The purpose of this agreement is to provide an array of meaningful postschool employment and residential alternatives for students with severe disabilities. Eligible students, at the point of graduation, need access to the adult service systems. Formal transition planning for individual students will begin in their freshman year or before, for the purpose of implementing meaningful employment and residential community based instructional programs in integrated environments. Adult service agency staff will be encouraged to be directly involved with students eligible for adult services through the students' Child Study Team process. The purpose will be to develop transitional IEP goals and long range service options prior to the students' last four years in school.

By combining the coordinated efforts of the Office of Public Instruction and the Department of Social and Rehabilitation Services during the years prior to graduation, the transition process is initiated by each agency's participation in the provision of employment, independent living, leisure options and recreation, and community integration options for graduating students.

Definitions involving transition from school to adult outcomes appear in Appendix A of this agreement.

A. All Parties Agree To:

1. Facilitate the transition of students with disabilities from school to work and/or adult services;

2. Identify current services, programs and funding sources provided within the community for secondary and post secondary aged youth with disabilities and their families;

3. Participate in the development of multiagency transition planning teams (Child Study Teams) to address present and future transition needs of students with disabilities, and to coordinate provision of services to those students;
4. Ensure the opportunity for full participation of parents in all phases of educational, vocational and/or residential decision making and planning;

5. Facilitate the development of community plans that address transition needs of individuals with disabilities. Plans should include a mission statement, goals and objectives, and an implementation strategy. A representative will be identified in each community to be responsible for the coordination of the development and finalization of this plan;

6. Assist in the development of changes to Administrative Rules of Montana that will mandate the inclusion of a transition planning component in the Child Study Team process for students with disabilities.

7. Promote and sponsor educational and public information programs to create a better public understanding of the adult service options of the parties to this agreement;

8. Participate in a single referral access system in each community that would meet annually to review files of students that are projected to graduate from school in four years to facilitate the networking of agencies and services in that community; and

9. Distribute copies of this agreement to their constituencies within a month of signing.

B. Office of Public Instruction

Agrees To:

1. Act as the lead agency by drafting changes to Administrative Rules of Montana which mandate the transition process, complete with a written plan, become a part of the Child Study Team process for each student who has a disability in Montana.

2. Assist local school districts in meeting the transition needs of students with disabilities;

3. Facilitate referral of students with disabilities to appropriate agencies for eligibility assessment and services; and

4. Encourage local school districts to provide available diagnostic information (i.e. medical, psychological, vocational and residential assessments) by specific names and service needs of students, at no cost, to adult service agencies. The purpose is to establish program eligibility as early as three to four years prior to the students' graduation date so that the students' names can be placed on the appropriate waiting lists for service delivery.

5. Prepare a yearly summary assessing the progress of transition services in communities, including recommendations for changes or improvements in the community system of transition services, and disseminating the summary to adult services, K - 12 Education, other agencies involved in transition planning, and the interested public by December 1, 1990.

6. Provide technical assistance to school districts, state agencies, and adult service providers on the use of federal and state resources for training students with disabilities; and
7. Require recipients of federal vocational education funds used for services to handicapped students to develop and implement a transition process for students with disabilities receiving those services as a condition for funding.

C. Developmental Disabilities Division of Social and Rehabilitation Services Agrees To:

1. Participate on local transition planning teams for those students that are eligible for services of the Developmental Disabilities Division;

2. Provide technical and consultative services to transition planning teams regarding eligibility requirements and service availability; and

3. Provide every effort at continuity of services upon graduation for eligible graduating students with disabilities who have completed a transition process developed by a transition planning team.

4. Develop a single referral access system in each community that would meet annually to review files of students that are projected to graduate from school in four years to facilitate the networking of agencies and services in that community;

D. Vocational Rehabilitation Divisions of Social and Rehabilitation Services Agree To:

1. Participate on the local transition planning teams for those students that are eligible for services of the Vocational Rehabilitation and Developmental Disabilities Divisions;

2. Provide technical and consultative services to transition planning teams regarding eligibility requirements and service availability; and

3. Provide every effort at continuity of services upon graduation for eligible graduating students with disabilities who have completed a transition process developed by a transition planning team.
II. EXECUTION AND MODIFICATION OF THIS AGREEMENT:

A. This agreement is effective January 1, 1990 and shall remain in effect until December 31, 1990, or until modified or terminated as stated below.

B. Any party may terminate or modify this agreement, in whole or in part, by submitting 30 days written notice to all other parties.

APPROVED

Nancy Keenan
Superintendent
Office of Public Instruction

Julia Robinson, Director
Social and Rehabilitation Services

3/23/90
Date

3/26/90
Date
APPENDIX A

DEFINITIONS

Transition: a carefully planned outcome-oriented process encompassing a broad array of services and experiences that lead to community adjustment, which requires competence in social and interpersonal skills, home living, and employment. Transition is a period that includes high school, the point of graduation, additional postsecondary education or adult services, and the initial years in employment.

The key elements of transition include:

- Longitudinal vocational training throughout the primary, middle and secondary school years;
- Cooperative and interagency transition planning that is systematic and occurs well before the age of 21 years of age;
- Parent, consumer and employer involvement in the transition planning process; and
- Community and professional awareness and support of multiple employment options.

Interagency Transition Plan: a comprehensive, longitudinal written plan that specifies the skills to be acquired by the student who will be exiting from school in three to five years, and the transition services to be received prior to and following graduation. The plan should include annual goals and short term objectives that reflect skills required to function on the job, at home, and in the community. Transition services should be specified, including referral to appropriate agencies, job placement, and on the job follow up.

Interagency Transition Plan Meeting: the appropriate forum for the different agency representatives to develop plans of long term service provision for graduating students. Each agency representative should assume responsibility for referral to and delivery of the various services that will be required for an effective transition from school to work.

Interagency Transition Planning Members:

Student
Parent/Guardian/Primary Caregiver
Vocational Rehabilitation Staff
Developmental Disabilities Case Manager
Developmental Disabilities Division Staff
School Employment Specialist
Special/Vocational Education Instructors
Adult Service Providers
School Support Services Staff

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APPENDIX E

Interagency Agreement For Supported Employment
between the
Developmental Disabilities Division
and the
Rehabilitative/Visual Services
Vocational Rehabilitation Divisions

FFY 1990

I. PURPOSE

The Rehabilitative/Visual Services Divisions (SRS/VR) and Developmental Disabilities Division (SRS/DDD) of the Department of Social and Rehabilitative Services enter into this agreement for the purpose of developing a clearly coordinated and defined systematic approach to the development and maintenance of supported work services in Montana. Among the goals of this statewide system are the creation of income producing work opportunities in integrated community settings for individuals with severe disabilities.

II. AGREEMENT

It is agreed that the SRS/VR and SRS/DDD will combine efforts and resources, including the Montana Supported Employment Demonstration (MSED) Project to develop and maintain a statewide system of supported employment for persons with developmental disabilities. This service will add supported employment in integrated settings to the current array of services offered by our mutual providers of service. Severely disabled employees participating in supported employment must be:

a) engaged in part-time or full-time employment which pays real wages and benefits commensurate with the person's ability to achieve goals or render services, and is based on current competitive rates in integrated work settings;

b) provide ongoing support and services necessary to maintain employment; and

c) provide normative cultural opportunities in the least restrictive, most integrated environment possible.

The models of supported employment recognized under this agreement will be those models that meet the following criteria:

a) capable of providing 20+ hours per week;
b) capable of competitive or minimum+ wages; and

c) integrated into the community as per Appendix A.

Competitive wages within the industrial norm is the highest level of appropriate wages. The highest level of integration is inherent in individual placements.

The common feature of all models of supported employment is that the individual is paid by an employer other than the supported employment provider, or there is a direct employer/employee relationship, as in crews and enclaves.

Vocational Rehabilitation funding available for eligible persons with developmental disabilities will be used for supported employment. Eligibility is defined as services to persons who have severe disabilities, and:

a) for whom competitive employment has not traditionally occurred or has been interrupted or intermittent as a result of those handicaps; and

b) have been determined by an evaluation of rehabilitation potential to have:

1. the ability or potential to engage in a training program leading to supported employment;

2. a need for on-going support services in order to perform competitive work; and

3. the ability to work in a supported employment setting.

Definitions of "supported employment," "competitive work," and "integrated work setting" appear in Appendix A of this agreement.

A. The Vocational Rehabilitation Program Agrees To:

1. Provide VR funds where appropriate and available to eligible persons with developmental disabilities.

2. Maintain a single point of access (SPA), jointly being redefined by these agencies, to supported employment programs statewide as jointly defined by VR and DDD through the MSED Project and in conjunction with administration of other VR and DDD programs. The transition of individuals from waiting lists to service through the SPA will receive special emphasis under this agreement.

3. Coordinate data taking efforts to determine the effectiveness of work services for the persons served. Provider agencies receiving funds from VR, DDD and the MSED Project will be required to participate in the data gathering efforts.

4. Develop an individualized written rehabilitation plan (IWRP) in coordination with the designated DDD case manager. Specific measurable outcomes will be included in the IWRP document. This document will be included in the individual habilitation plan (IHP) or case management team (CMT) as necessary.
5. Provide opportunities for training and technical assistance to providers and administrative staff in supported employment services.

6. Pursue further regulatory accommodation to achieve an individual oriented supported employment program.

7. Evaluate and revise as needed the system for access to VR funds (refer to Appendix B).

8. Coordinate with DDD in the transition of school age individuals from school to integrated work settings.

9. Adopt as a goal in common with DDD, the development of a system that guarantees ongoing support for all individuals placed through its activities.

B. The Developmental Disabilities Division Agrees To:

1. Participate in the MSED supported employment activities in Montana as designated by this agreement.

2. Work with SRS/VR in the development of long term funding options for supported employment.

3. Continue efforts through the legislative and budget processes to expand appropriate supported employment services for Montanans with severe disabilities.

4. Work with SRS/VR to refine the single point of access to make the process compatible with the SRS/DDD supported employment waiting list and the SRS/DDD screening process.

5. Meet with SRS/VR staff on a regular basis to share program information and discuss significant program concerns.

6. Provide long term extended service funding within existing resources to eligible individuals.

7. Work with SRS/VR staff and individual service providers to maximize the realignment of centerbased work activity center and sheltered employment resources to integrated competitive work settings.

C. Both Parties Agree To:

1. Work cooperatively in all levels of development of the supported work service system, including reallocation of existing resources to conform to the highest level of services in supported employment.

2. Participate in the SPA as negotiated.

3. Promote increased long term funding alternatives for individual groups currently not funded by DDD.

4. Coordinate part time and short term placements into work activity centers, sheltered employment, extended employment or work adjustment training when appropriate to support the individual.
5. Maintain annual cost of service experience for 1990, including time limited services and extended services expenditures.

6. Evaluate and revise as needed criteria and procedure for transitioning from VR funded services to DD funded services. This process includes the joint determination by both divisions that the individual has been stabilized in the employment setting and that change in funding is appropriate for each person. This process is included under Appendix C.

7. Maintain the vendor system for supported employment currently in operation in Montana.

8. Develop a joint strategy for expanding the vendor system for supported employment during this biennium.

9. Promote by 1991, that mutual recognized providers of supported employment will be accredited by a nationally recognized accreditation organization.

10. Maintain access to appeal by consumers and other parties involved in supported employment services.

11. Provide cross training, technical and consultative services between the two agencies' staff regarding eligibility requirements, case management, service availability, and service delivery of each respective agency.

III. SERVICE GOALS AND COMMITMENTS FOR FEDERAL FISCAL YEAR 1990

The following list represents the service goals of the SRS/VR Transitional Employment Services Unit. It represents a projected investment of SRS/VR funds for persons with developmental disabilities. Also contained in this listing is the extended service commitment of SRS/DDD. These joint service goals should not be construed as vendor commitments.

<table>
<thead>
<tr>
<th>SERVICE VENDOR</th>
<th>SERVICE CAPACITY</th>
<th>FUNDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billings Workshop</td>
<td>5</td>
<td>VR, DDD</td>
</tr>
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</tr>
</tbody>
</table>

SRS/VR has established, as a goal, the commitment of $166,440.00 towards time-limited training for 37 individuals with developmental disabilities. The SRS/DDD has reserved

1 Service capacity is defined as the amount of resources the agency agrees to convert, the amount of expansion, and/or attrition.
a funding stream for extended services for the above referenced caseload of 37 individuals an annual dollar value in the range from $114,700.00 to $203,500.00.\(^2\)

The listing of vendors and goals does not constitute a limit on actual vendors or numbers served in FFY 1990. Additional vendor applications will be considered in accordance with the stipulations addressed in Appendix B.

IV. EXECUTION AND MODIFICATION OF THIS AGREEMENT

A. This agreement is effective October 1, 1989 and shall remain in effect until September 30, 1990, or until modified or terminated as stated below.

B. Either party may terminate or modify this agreement, in whole or in part, by submitting 30 days written notice to the other party.

APPROVED:

Julia Robinson  
Director of the Department of Social and Rehabilitation Services

Margaret Bullock  
Administrator, Rehabilitative/Visual Services Divisions

Dennis M. Taylor  
Administrator, Developmental Disabilities Division

\(^2\) This is an estimation of the cost of the extended service if all goals were met. It is based on current experience for DDD clients who are served at an average cost of $4000.00 per year, combining both time limited and extended services.
APPENDIX A

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Competitive Employment: work that is performed on a full-time basis, averaging at least 20 hours per week for each pay period, and for which an individual is compensated in accordance with the Fair Labor Standards Act.

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(A) 1. Most co-workers are not handicapped; and
2. Individuals with handicaps are not part of a work group of other individuals with handicaps; or

(B) 1. Most co-workers are not handicapped; and
2. If (A)[2] is not possible, individuals with handicaps are part of a small work group of not more than eight individuals with handicaps; or

(C) 1. If there are no co-workers, or the only co-workers are members of a small work group of not more than eight individuals, all of whom have handicaps, the individuals with handicaps have regular contact with non-handicapped individuals, other than personnel providing support services in the immediate work setting.

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A1. Active - consumer and trainer at the job site; time in active training, observation and/or recording.

A2. Job Site Analysis - job coach at the job site learning the job for the purpose of conducting the task analysis leading to the job analysis report.

B. Transition Activities

B1. Employer Contact Time - time spent:

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* public or private transportation utilization training;
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**B3. Advocacy Time** - time spent advocating with persons (i.e. school personnel, medical doctors, case managers, Social Security) who directly affect the consumer's support system.

**C. Daily Units of Service**

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**C2. Transitional Placements** - a training service provided on a daily unit basis for the primary purpose of allowing for a transitional work experience leading to either a permanent transitional or job placement outcome. The training service is regulated by the following conditions:
* an individual placement is restricted to 60 working shifts (approximately 3 months); and
* the transitional placement series is restricted to 120 working shifts (approximately 6 months).

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1. Vocational Evaluation*
2. Vocational Assessment*
3. Job-Site Evaluation*
4. Supported Employment Job-Site Evaluation

Transitional Employment Services

1. Work Adjustment Training*
2. Transitional Placements
3. Transitional Employment Services (supported outcomes)
4. Transitional Employment Services (non-supported outcomes)
5. Extended Employment Programs (in-house or sheltered, and community based)*
6. Job Placement (all outcomes)

(NOTE: All the services listed above proceeded with an asterisk are purchased exclusively from the eight primary CARF accredited facilities listed below.)

Facility Providers

The three types of facility providers for the above services are:

- The Primary List of Providers,
- The Cooperative Expansion List of Providers, and
- The Unlisted Cooperative Providers.

The following is a description of the three types of facility providers.

The Primary List of Providers

The eight primary CARF accredited facilities are:

| Billings Workshop                  | Billings |
| Butte Sheltered Workshop           | Butte    |
| Community Medical Center           | Missoula |
| Eastern Montana Industries         | Miles City |
| Easter Seal/Goodwill Industries    | Great Falls |
| Flathead Industries                | Kalispell |
| Helena Industries                  | Helena   |
| Opportunity Industries             | Missoula |

These providers belong to the Primary List of Vocational Rehabilitation providers. They are distinguished by their capacity to provide an array of work oriented services to people experiencing disabilities leading to all three VR employment outcomes. Those outcomes are:
1. Competitive Employment  
2. Sheltered Employment  
3. Supported Employment

The Primary List of Providers is distinguished also in that the facility is not limited by definition or practice to serving a specific disability group or diagnosis.

The Cooperative Expansion List of Providers

VR has now expanded to include the following facility providers for the balance of the "asteriskless" services listed above. This group of providers are called the Cooperative Expansion Facilities. They are characterized by being existing providers for agencies other than SRS/VR but from whom VR purchases services because of the cooperative agreement with those agencies. These facilities are currently covered under cooperative agreements with the Developmental Disabilities Division of Social and Rehabilitation Services and the Treatment Services Division of the Department of Institutions.

Eastern Montana Community Mental Health Center (Region I) Miles City
Golden Triangle Community Mental Health Center (Region II) Great Falls
Job Connection Inc. Billings
Mental Health Center (Region III) Billings
Mental Health Services Inc. (Region IV) Helena
Northern Gateway Enterprises Conrad
Reach Inc. Bozeman
Western Montana Community Mental Health Center (Region V) Missoula

SRS/VR is committed to the strengthening of programs being provided through the Primary Facilities and Cooperative Expansion Facilities. The recent Legislature provided little hope for additional funding or substantial increases. This means the possibility of any further expansion is unlikely for Section 110, Title VI Part C, or Extended Employment programs. Facilities on both lists are funded through fee-for-service set aside budgets. The two anticipated exceptions are the Job Placement Contracts ($120,000) and Extended Employment Conversion Contracts. Additional providers on the Cooperative Expansion List of Providers will be added if:

1. A need for service is described in terms of people experiencing severe disabilities who are appropriate and interested in transitional employment services;
2. VR has the capacity to purchase from the provider the threshold level of services required for the provider to maintain the effort for at least three projected years of service, or until the service need has been met; and

3. The applicant vendor can demonstrate the required service capacity in post VR extended services.

Unlisted Cooperative Providers

Providers who are not currently listed on the Cooperative Expansion List, but are providers for agencies with which SRS/VR has a cooperative agreement may provide services to VR on a client-by-client basis if:

1. They can demonstrate an extended service capacity, and

2. VR transitional employment services funding is available.

Unlisted cooperative providers are not provided an annual set-aside budget level, but are assured of the commitment to serve the individual client to the conclusion of VR time-limited services.

True Service Capacity and Supported Employment

All providers of Transitional Employment Services will be required to demonstrate a service capacity in the provision of extended services (follow-along, or ongoing supported employment services) in order to receive a set-aside budget. The set-aside amount reflects the facility's true service capacity up to a ceiling amount. In the quarter preceding Federal Program Year 1990 (July 1 through September 30, 1989), the Supported Employment Program Specialists approached each facility and discussed the facility's true service capacity in supported employment outcomes. True service capacity set-aside budget is the number of funded follow along slots multiplied by (x) the average cost per time-limited case for that disability group. If Primary or Cooperative Expansion Facilities cannot meet the amount of service capacity in their projected set-aside budgets, that unused portion will either:

1. Be used to establish a threshold budget for adding a new vendor to the Cooperative Expansion list. This will occur only if the unused funds are projected to be available over at least a three year period; or

2. Be used in a general district transitional employment services budget to purchase Transitional Employment Services from facilities on any of the three lists depending on client need.
APPENDIX C

TRANSITIONING FROM TIME-LIMITED SERVICES TO EXTENDED SERVICES

VR moves to case closure and transition when skill training has reached a stable level. Stability is reached when new skills or tasks are being learned or acquired by the consumer on the job site and the primary purpose for on-site intervention is skill maintenance. The threshold for consideration of transition occurs when:

- the job-site job coach or supervisory intervention hours fall at or below 20% of the average weekly hours worked by the consumer and remains at or below 20% for a minimum of 60 days;

- the job-site job coach or supervisory intervention hours have stabilized at or above 20% of the average weekly hours worked by the consumer and:
  1) remain at a stable level for a minimum of 60 days, and
  2) a successful transition to extended services is negotiated with the extended service provider, and

- all other off-site transition skill training activities (money management, grooming, transportation) have been adequately addressed in the transition plan to allow for a successful transfer of those responsibilities to the extended service provider.

A consumer's off-site personal management issues can postpone a closure when the "20% rule" has been met if those issues threaten the stability of the consumer's job and can reasonably be expected to be improved through time-limited job coach interventions.
INTERAGENCY COOPERATIVE AGREEMENT
FOR THE PURPOSE OF CREATING
SUPPORTED EMPLOYMENT OPPORTUNITIES
FOR PEOPLE WITH SEVERE DISABILITIES

I. Purpose

The purpose of this agreement is to facilitate the provision of services for persons with severe disabilities. This agreement establishes principles and procedures for integrated, unduplicated services to those served by our agencies.

This agreement is to foster the development and implementation of supported employment services in Montana. These services create opportunities for work in integrated community settings for people with severe disabilities.

Vocation and income producing work are important in the development of persons with severe disabilities. The parties, as agencies of the state, share responsibility for creating an integrated system of services leading to the empowerment of consumers with severe disabilities.

II. Parties

This agreement is between the Department of Social and Rehabilitation Services:

The Rehabilitative/Visual Services Division (VR);
The Developmental Disabilities Division of the Department of SRS;
The Department of Institutions Mental Health Services Division;
The Office of Public Instruction; and
The Department of Labor and Industries.

III. Lead Agency

The Rehabilitative/Visual Services Division (VR) of the Department of Social and Rehabilitation Services is the lead agency for the purposes of coordinating the cooperative efforts provided for in this agreement.
The mission statement for the Department of SRS is “Working Together to Empower Montanans.” The rehabilitation outcomes to be accomplished with the coordinated resources of cooperating agencies support the concept of “empowerment.” Support systems must be appropriate to the individual consumer. The agencies’ capacity to provide services leading to supported outcomes is directly dependent on their cooperation. We are committed to enabling the consumers of our common services to achieve the most integrated least restrictive vocational outcomes feasible.

IV. All Parties signing this agreement commit to:

1. Participating on an Interagency Program Funding and Planning Committee. This committee will be composed of representatives of each of the agencies and meet at least once annually or more often based on need. This interagency committee will:
   a. Discuss support programs and funding for clients served in common by the agencies.
   b. Investigate and when feasible implement joint programming utilizing common language and definitions, and coordinate funding streams.
   c. Generate additional program funds by exploring new matching options between our agencies.
   d. Coordinate, when appropriate, legislative funding initiatives for vocational programs.

2. Strengthening transitional programs for students with disabilities moving from school to work utilizing the agencies’ vocational resources.
3. Providing cross training and technical assistance between the agencies.
4. Establishing and evaluating annual goals for our interagency work towards coordinated vocational and support services.
5. Assigning a person to serve as a liaison with the Rehabilitative/Visual Services Divisions of SRS for the purpose of carrying out the intent of this agreement.

V. The Discrete Agreements

This part of the agreement is a series of discrete statements of cooperation between the Department of SRS Rehabilitative/Visual Services Divisions of SRS and the other parties. Each party agrees in general to all statements in sections I though IV of this agreement and to those statements which apply to them under their portion of Section V.
The Rehabilitative/Visual Services Division of SRS and the Developmental Disabilities Division of the Department of SRS agree to:

1. Develop a coordinated plan of supported employment services utilizing common providers of service for mutual consumers of services. The service plan includes the names of recognized vendors, their service capacity, and funding and service commitments. Attachment A represents the service plan for the time period of this agreement.

2. Engage in cross-training of staff by offering training topics of mutual need and encouraging participation of staff in the Developmental Disabilities Conference, the Montana Association of Rehabilitation Conference and the Montana Supported Employment Demonstration Project Annual Conference.

3. Offer training and technical assistance to school staff who share responsibility for enabling graduating students with disabilities to transition through our services from school to work.

4. Assign staff to participate in local case managers coalitions (SPA) and school transition teams to assure communication and coordination at the service delivery level.

5. Develop and offer training to parents and advocates of children and adults with developmental disabilities on access and utilization of our division’s services.

6. Communicate and coordinate audit schedules for providers of services identified in this agreement and service plan.
The Rehabilitative/Visual Services Division of the Department of SRS and the Department of Institutions Mental Health Services Division agree to:

1. Develop a coordinated plan of supported employment services utilizing common providers of service for mutual consumers of services. The service plan includes the names of recognized vendors, their service capacity, and funding and service commitments. Attachment A represents the service plan for the effective period of this agreement.

2. Develop supported employment program standards to be included in contracting with mutual providers of service. These standards will be recognized by the Department of Institutions and included in the community mental health standards.

3. Participate in a joint program planning and assessment group composed of representatives of the Mental Health Services Division, RSD/VSD, and direct line supported employment service providers (i.e. job coaches, first line supervisors, or case managers). This task force will explore ways to improve funding and service provision both at the VR time-limited phase and the D of I extended service phase. This task force will meet and publish its recommendations in the span of this agreement.
The Rehabilitative/Visual Services Division of the Department of SRS and the Office of Public Instruction agree to:

1. Jointly promote the implementation of the new Education of the Handicapped Act (EHA) requirements for transition services as part of the IEP process.

2. Conduct a transition workshop (.5-1.5 days) in which personnel from both agencies jointly address the needs of professional staff in school and adult services who share the common mission of preparing students with severe disabilities for the world of work.

3. Commit to a continuity of services for students with disabilities who are graduating from school and moving to an adult service system. Where continuity cannot be sustained commit to counting by disability those students for whom essential support services cannot be found.

4. Offer training and technical assistance to school staff who share responsibility for enabling graduating students with disabilities to transition through our services from school to work.
The Rehabilitative/Visual Services Division of the Department of SRS and the Department of Labor and Industries agree to:

1. Assign a staff liaison to work over the span of this agreement on points of interdepartmental cooperation which will promote:

   a. An exploration of new uses of job training funds for clients with severe disabilities.

   b. Expanded information sharing and coordination between the agencies job development and placement personnel.

   c. Exchange training announcements dealing with disability related topics. Whenever possible open training to staff exchange.

   d. An exploration of the use of the department's resources for the development and provision of extended job training services to persons with severe disabilities.
VI. Execution and Modification of this Agreement:

A. This agreement is effective March 1, 1991 and shall remain in effect until September 30, 1991.

B. A party may modify the terms of their part of this agreement upon concurrence of all other parties and may terminate the terms of their part of this agreement by submitting 30 days written notice to the Department of Social and Rehabilitation Services Rehabilitative/Visual Services Divisions (VR)
INTERAGENCY COOPERATIVE AGREEMENT
FOR THE PURPOSE OF CREATING
SUPPORTED EMPLOYMENT OPPORTUNITIES
FOR PEOPLE WITH SEVERE DISABILITIES

Signature Page

Department of Social and Rehabilitative Services

Julia Robinson, Director

Erich Merdinger, Acting Administrator
Developmental Disabilities Division

Joe Mathews, Administrator
Rehabilitation/Visual Services Divisions

Office of Public Instruction

Nancy Keenan, Superintendent of Public Instruction

Department of Institutions

Curt Chisholm, Director

Dan Anderson, Chief
Mental Health Bureau

Department of Labor & Industries

Mike Micone, Commissioner
Attachment A

FFY 91 Service Agreement

The numbers represent the goal number of VR placements that would be eligible to transition into extended services. The estimated support factor per consumer per year for 1991 is $3,800.

<table>
<thead>
<tr>
<th></th>
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<th>DD</th>
<th>VREE</th>
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AUTHORIZED TRANSITIONAL EMPLOYMENT SERVICES

Rehabilitative/Visual Services Division purchases transitional employment services leading to supported employment outcomes. This directory describes the range of transitional services authorized for purchase from vendors. Services are purchased in "Units". One hour of staff time spent in an authorized activity is equal to one unit. Units may be reduced down to quarter units for billing purposes when the intervention is less than 60 minutes.

A. JOB-SITE ACTIVITIES

A1. Active: consumer and trainer at the job site; time in active training, observation and/or recording.

A2. Job Site Analysis: job coach at the job site learning the job for the purpose of conducting the task analysis leading to the job analysis report.

B. TRANSITION ACTIVITIES

B1. Employer Contact Time: time spent;
   * traveling to and from the employment site; and/or
   * advocating directly with the employer, supervisor and coworkers for the consumer.

There is a 2 unit per contact limit without justification and all units billed must be pre-authorized (see job development summary).

B2. Consumer Training Time: time spent training the consumer, when not at the job site, in:
   * transportation training time: time spent training consumer to utilize public or private transportation;
   * time spent with consumer on money management, grooming, and counseling;
   * program development for consumer; and
   * worker support groups.

B3. Advocacy Time: time spent advocating with persons (i.e. school personnel, medical doctors, case managers, Social Security) who directly affect the consumer's support system.

C. DAILY UNITS OF SERVICE

C1. Crews and Enclaves: group models of supported employment.

C2. Transitional Placements: a training service provided on a daily unit basis for the primary purpose of allowing for a transitional work experience leading to either a permanent transitional or job placement outcome.

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ATTACHMENT A WORKING DEFINITIONS:

Rehabilitative/Visual Services Divisions utilize the following definitions in the administration of the transitional employment services leading to supported employment outcomes.

"Case Management" those responsibilities involved in working with a consumer to develop, implement, evaluate and maintain a program of services.

"Case Manager" means the individual to whom case management responsibilities have been assigned or assumed for either a time-limited or indefinite period.

"Closure Criteria" VR moves to case closure when new skills or tasks are not being learned or acquired by the consumer on the job-site and the primary purpose for on-site intervention is skill maintenance. The threshold occurs when:

* the job-site job coach or supervisory intervention hours fall at or below 20% of the average weekly hours worked by the client and remains at or below 20% for a minimum of sixty days;

* the job-site job coach or supervisory intervention hours have stabilized at a level at or above 20% of the average weekly hours worked by the client and:

  1) remains at a stable level for a minimum of sixty days, and
  2) a successful transition to extended services is negotiated with the extended service provider; and all other off-site transition skill training activities (money management, grooming, transportation) have been adequately addressed in the transition plan to allow for a successful transfer of those responsibilities to the extended service provider.

A consumer's off-site personal management issues can postpone a closure when the "20% rule" has been met if those issues threaten the stability of the consumer's job and can reasonably be expected to be improved through time-limited job coach interventions.

"Competitive Work" means work averaging at least 20 hours per week per pay period for which the worker is compensated in accordance with the Fair Labor Standards Act.
"Extended Employment" means competitive work provided through a CARF accredited work oriented rehabilitation facility in a sheltered or integrated work setting.

"Integrated Work Setting" means job-sites where:

(A) [1] most co-workers are not handicapped; and [2] individuals with handicaps are not part of a work group of other individuals with handicaps; or
(B) [1] most co-workers are not handicapped and [2] if [A] [2] is not possible, individuals with handicaps are part of a small work group of not more than eight individuals with handicaps; or
(C) [1] if there are no co-workers, or the only co-workers are members of a small work group of not more than eight individuals, all of whom have handicaps, and the individuals with handicaps have regular contact with non-handicapped individuals other than with personnel providing support services in the immediate work setting.

"Job Coach" refers to a case manager with specialized skills in marketing, job development, on-site job analysis, on-site job training, advocacy, and benefits counseling.

"Sheltered Work Setting" means a setting where the employer is the facility and the individual with a handicap works physically within the facility or in community based work crews that do not meet the criteria for an integrated work setting and/or competitive work.

"Supported Employment" means competitive work in an integrated work setting for a person with a severe disability who is in need of assistance in order to become employed or remain employed.

"Support Services" means the necessary job skills training provided to enable a person with a severe disability to sustain work.

"Transitional Employment Services" are services provided by the facility job placement specialist or job coach leading to supported or nonsupported employment outcomes. Appendix I is the current array of Transitional Employment Service activities recognized by the Rehabilitative/Visual Services Divisions (VR).