

WORK INCENTIVES INFRASTRUCTURE

Building NH's Capacity

Granite State Employment Project

Making the Commitment

June 17, 2009

Why the strong commitment?

When we choose to **not** understand Work Incentives and how to access and use them (whether consciously or unconsciously), we contribute to people remaining in **poverty**.

Why is this important?

In order for people to live life to their fullest potential, they need to be freed from system imposed limitations

Our informed help is needed to navigate these complex systems and programs

Purpose of Today

Create a clear Vision for what is needed in NH to connect individuals, families and professionals to accurate and accessible information on how and when to use Work Incentives

What our day will look like

Morning Session:

Employment Supports Continuum

~ Barbara Otto, NCHSD

Work Incentives Model in NH

~ JoAnne Malloy & GSIL

Making the Vision Reality

~ Barbara & JoAnne

What our day will look like

Afternoon:

Models for Moving Forward

~ JoAnne & Barbara

Next Steps & Agreements

~ Barbara

Employment Supports Infrastructure in New Hampshire

Creating and Sustaining Work
Incentives Infrastructure
throughout the Disability Services
Systems

What is the Goal? Why are we here?

Paradigm Shift: “You Can Work!”

All people with disabilities in New Hampshire get the information they need about employment services and supports – including work incentives programs -- no matter where they touch the disability services system. Nobody is prevented or discouraged from pursuing an employment path based on misinformation or lack of information about how public benefits and health insurance will be impacted by employment income.

GSEP Vision for Getting to the Goal

- **Virtual Resource Center** where state agencies, service providers, and individuals can go to get accurate information, technical support and referral to services
 - *Virtual – not bound by “bricks & mortar” so many different entry points in to get resources*
 - *Opportunity – “virtual” creates a need for many different approaches for training, information sharing and counseling*
 - *Collaboration & Coordination– “virtual” also means potential for many partners and need for coordination*

EMPLOYMENT SUPPORTS

PUBLICLY FUNDED DISABILITY SERVICES SYSTEMS

EMPLOYMENT!

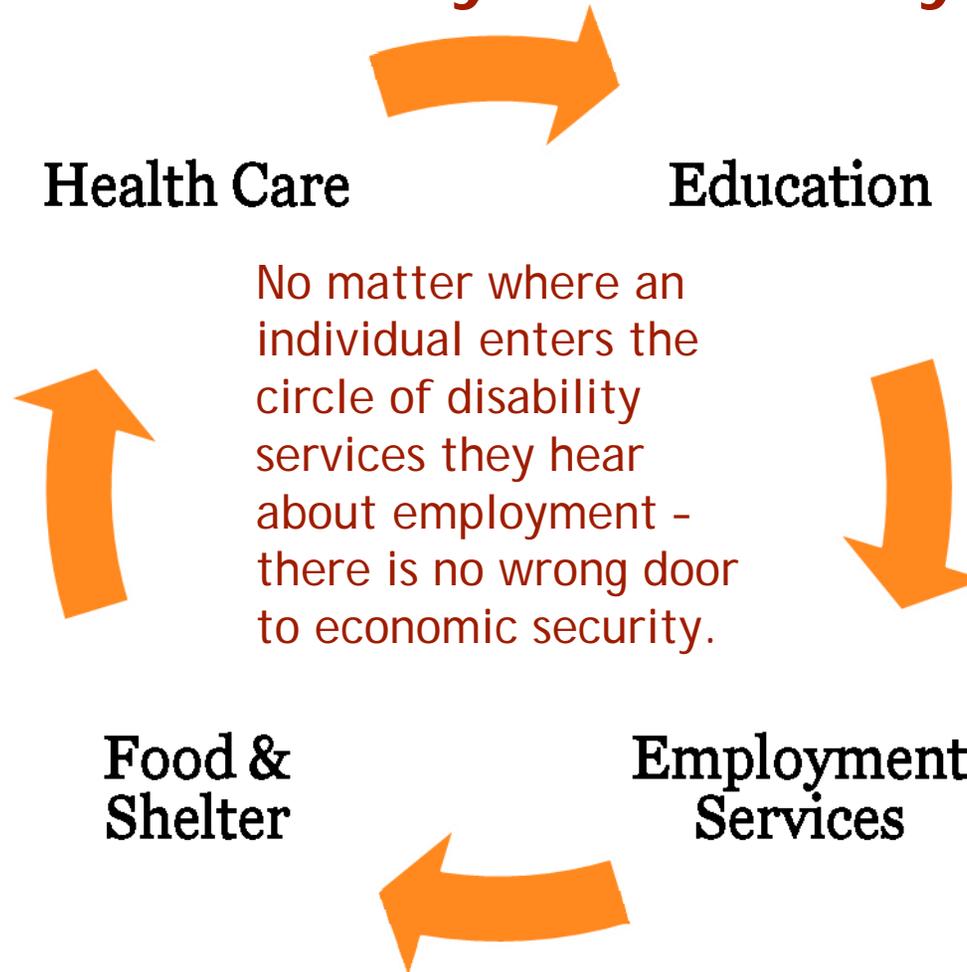
Health Care:
Message: You can work without losing benefits.

Education:
Schools, community colleges, parents, and youth all are aware of the opportunities; programs and services are geared toward career development and ultimately, self sufficiency.

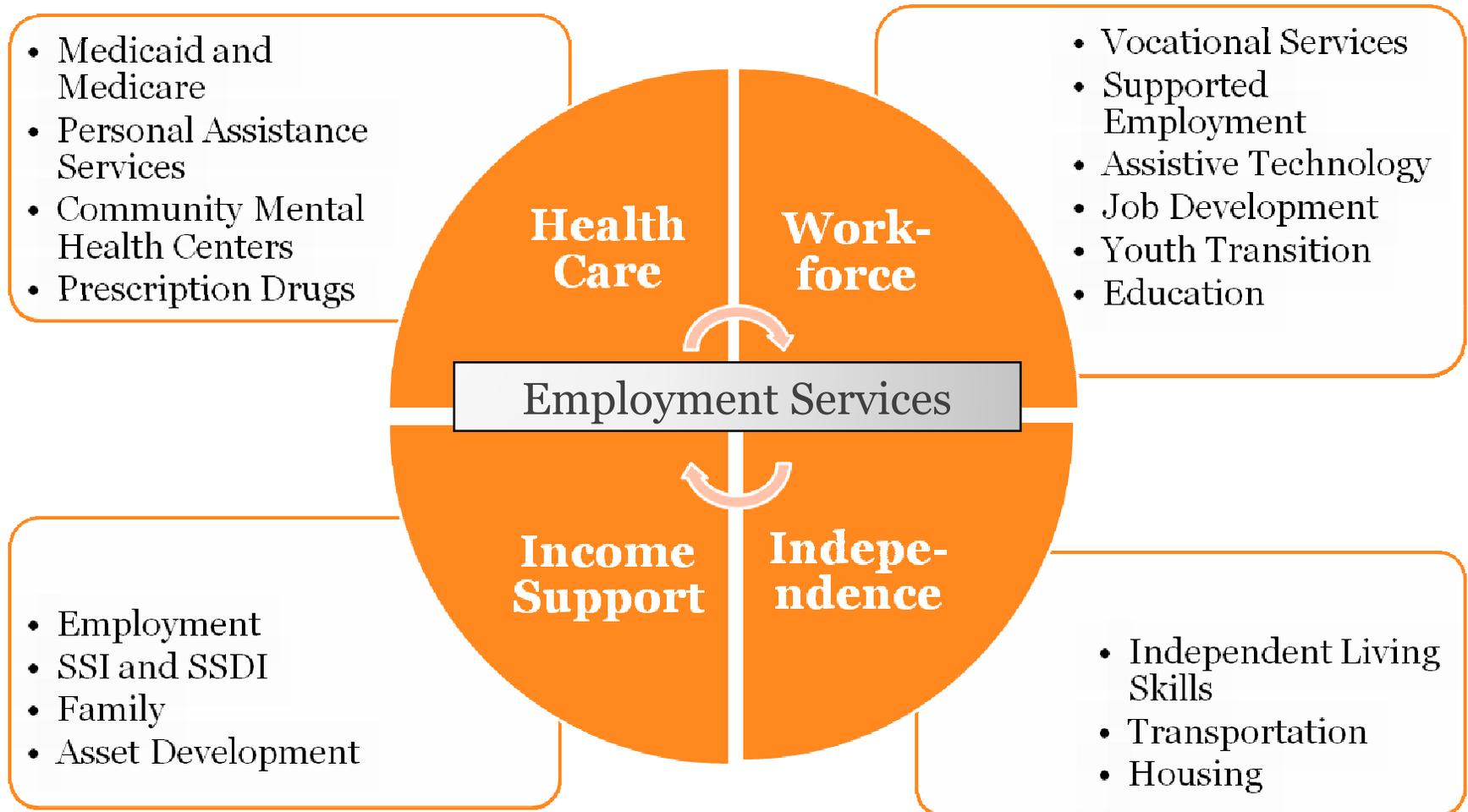
Employment Services: All of the funders of employment services are focused on sustainable employment outcomes that move individuals toward economic security.— no matter where an individual enters the “system”. This includes supported employment, peer mentoring supports, health related employment supports (PAS)

Services Navigation: The SSA funded WIPA and SSA/DOL funded Disability Program Navigators assist individuals to navigate the complicated services and supports that individuals need to transition into employment and move into careers. In addition to WIPA and DPNs, there are other “navigation” services needed for Housing, Transportation, Asset Building programs, Financial Literacy and as health care reform evolves, assistance in navigating the health care programs & services.

States Systems View: *Integrated Disability Services Systems*



Individual Level View



Building Sustainable Employment Supports Infrastructure

- **Four components:**
 - *Vision.* Do you have a vision for building an employment supports infrastructure?
 - *State assessment.* Do you know what you need?
 - *Stakeholders.* Are they engaged in the process?
 - *Resources.* Does your state have the existing resources to sustain infrastructure?

State Assessment Process

- What is the state's vision for its employment systems and supports?

Are you building toward an employment supports system that moves individuals beyond SGA?

If yes, then you need to evaluate whether you have the system in place to move individuals beyond SGA and support them beyond employment.

State Assessment Process

1. Document existing services, organizations, and resources are available that provide employment and health related employment supports
 - Do the services and supports offered in the state match up to your vision of employment supports infrastructure?
2. Identify the “players”
 - Who is providing services
3. Identify gaps/overlaps
4. Look at data – look at employment outcomes of existing system

Convening/Facilitating Stakeholders

- Key stakeholder populations:
 - WIPA – what do they see as needs in your state?
 - People with disabilities – what services and supports do they say they need?
 - State agency partners – what do they perceive as needs? Have they done a strategic analysis?
 - Services providers – what services and supports do they feel are missing in the state?
 - PABBS – what do they see as needs?

Working with GSIL WIPA

- **Case Load**
 - Does the WIPA have a waiting list for services?
 - What kinds of services and supports are most in demand? (e.g. what kinds of calls are you getting)
- **Service Delivery**
 - Is the WIPA able to achieve state-wide coverage?
 - Is the WIPA able to reach cross-disability populations?
 - How many of the work incentives recommended by the WIPA are implemented?
- **Other?**

What do individuals say they need?

- Information about the impact of work or earnings on benefits?
- Help navigating the system to get access to the work incentives, other state public benefits or the ADA?
- Help determining whether to take a job?
- Help with keeping their health care and/or PAS when they go to work?
- Help developing an Impairment Related Work Expense (IRWE), Plans for Achieving Self Support (PASS) plan or other work incentives program?
- Help getting a reasonable accommodation on the job?
- Others?

What do service providers say they need?

- Information *about* the WIPA and instruction on *who* to refer for WIPA services?
- Simple information & materials about the range of federal and state work incentives programs?
 - Ability to explain that individuals can work and still access health care (including Medicare Part D) and a range of employment related health care supports
- Access to training and technical support to keep skills current?
- Others?

Other information to help guide the approach to Infrastructure

- General statistics on the following :
 - IRWEs – 20*
 - PASS – 13*
 - BWE – 6*
 - 1619(a) & (b)
 - Overpayments
 - Medicaid Buy-in enrollees
 - Part D Dual Eligibles
- Does my state have high utilization of work incentives programs?
- Do we know how many people with disabilities are working in New Hampshire?

Ticket to Work and Employment Networks in NH

- 49,367 Tickets mailed to Social Security beneficiaries
- 128 assigned Tickets
- Employment Networks:
 - Granite State CIL
 - Arthur Kaufman
 - Ethel's Tree of Life
 - Goodwill Industries
- 3 ENs have received payment

What resources are available in New Hampshire to meet the need?

- Source for training and technical assistance?
(Or do you have to build it?)
- Funding for training and technical support -- to implement and maintain the model?
- Do you have funding to sustain the existing infrastructure and any new infrastructure developed?

Opportunity & Potential of Ticket to Work as the ONLY new funding stream:

- Ticket to Work has the potential...
 - To increase the amount of dollars available for follow along services such as exploring career advancement;
 - To help people improve their quality of life through assistance with transportation, housing and community living supports;
 - To create concrete linkages to natural supports in the work place;
 - To help individuals access additional job & skills training;
 - To connect individuals financial literacy supports

Work Incentives Centers

- ▶ Information & Referral – for individuals and providers;
- ▶ Training & Technical Assistance – source for expert training and problem solving;
- ▶ Benefits Planning Services – either through collaboration with WIPA or with a parallel set of trained benefits planners; and
- ▶ Resource Center for multiple audiences

Connecticut's Connect -Ability Center

- ▶ MIG funded “virtual center” that provides training, technical assistance and direct services.
- ▶ Housed & managed in VR (in a larger agency structure where the Medicaid agency is an integral part of decision making and policy development), Connect-Ability provides training and support to other state agency partners on state and federal work incentives.
- ▶ Current plan is to build training and TA for providers and consumer advocates.

North Dakota's Work Incentives Support Center

- ▶ MIG provides support to agency with SSA WIPA Project (allows for additional CWIC – ND has two for entire state).
- ▶ MIG funding allows the WIPA agency to dedicate time to build capacity of service providers across the state on the state and federal work incentives through training, technical assistance and information sharing.
- ▶ MIG staff created a state-wide Benefits Planners Task Force (which includes the WIPA) to build a Work Incentives Support Center to serve as a service provider resource for training, technical assistance and education and outreach on work incentives.

Why should we create a *Work Incentives Resource Center*?

- Questions for the Group:
 - Is every individual with a disability getting access to services and supports they need that helps them make an informed choice about work?
 - Do we know how individuals with disabilities get information about work now?
 - Is there capacity for this work in NH (e.g. do our providers and community-based groups know about work incentives and other supports)?

LESSONS LEARNED:

What we learned from NCHSD states

What we asked NCHSD states:

- What would you tell other states about Program Design?
- What would you tell other states about Program Implementation?
- What would you tell other states about funding?

Lessons Learned: Program Design

- Needed to spend more time on analyzing what the state really needed, rather than just forging ahead;
- Needed to analyze how this new infrastructure can fit in the larger structure of social services available on reservations and in disability services system;
- The program design has to be transparent and involve consensus based decision-making and product development in order to be successful.

Lessons Learned: Program Design

- Quality assurance needs to be a part of the program design – not an afterthought.
- Stakeholder participation throughout program implementation is key. Check to see that there is continued buy-in and feed back so that everybody takes ownership.

Lessons Learned: Program Implementation

- Clear plan on who is going to do the training and provide on-going technical support to support the technical components of what we built.
 - Clear plan on who is going to provide on-going support to individuals who were “trained” in education & outreach – very different needs from providers.
- Creating a new service and training 10 new staff simultaneously was very difficult. Implementing the program in phases would have been helpful.

Lessons Learned: Program Implementation

- Clear memorandums of understanding between partners that detail roles and expectations needs to be in place BEFORE you move forward.
- Significant mentoring or supervision is required in early stages for new benefits planners.
- Others?

Lessons Learned:

Funding Comprehensive Employment Supports Infrastructure

- ▶ Funding agreements across all systems involved – should be in place BEFORE you move forward.
- ▶ Building the “permanent” funding stream for the WIPO infrastructure *upfront* was important to engaging providers.
- ▶ Engage stakeholders in planning for funding your infrastructure.
- ▶ There are multiple sources of potential funding out there that can be pursued while you are building the infrastructure.

What NCHSD has learned as a TA provider:

- States have different needs which require a more customized approach – needs assessment similar to the work done to create a Medicaid Buy-in;
- Employment supports infrastructure that has had success had “architects” that had strong understanding of work incentive programs;
- Implementing an evaluation plan is challenging – but critical if you want to sustain your infrastructure.
 - This is where smaller scale implementation strategies can pay off – you’re not doing too much too fast.

What NCHSD has learned as a TA provider:

- Emphasis on providing the benefits planning services – either supporting SSA funded WIPA (BPAO) or through parallel network - has not built the kind of “infrastructure” states can sustain
 - States that built benefits planners, rather than building capacity of existing provider networks– benefits planning is a “snapshot” in time for the individual, the approach didn’t get the state any closer to sustainable employment supports *infrastructure*.

The Big Picture: Building *Sustainable* Employment Supports Infrastructure

- No one size fits all – the trick here is to match state needs with the right services and supports along the employment supports continuum.
 - Oregon’s model may not translate well in other states; and
 - Most states don’t need more benefits specialists –they need better trained providers to play a stronger role in the existing disability services system.

The Big Picture: Building a Sustainable Employment Supports Infrastructure

- Making a good “match” involves:
 - Identifying services needed;
 - Determining which of these services/supports need to be developed or enhanced;
 - Pinpointing what resources you have to commit to enhancing any new infrastructure; and
 - Planning for how these services/supports can be sustained beyond the life of federal grant program.

Existing Funding Streams for Employment Supports Infrastructure

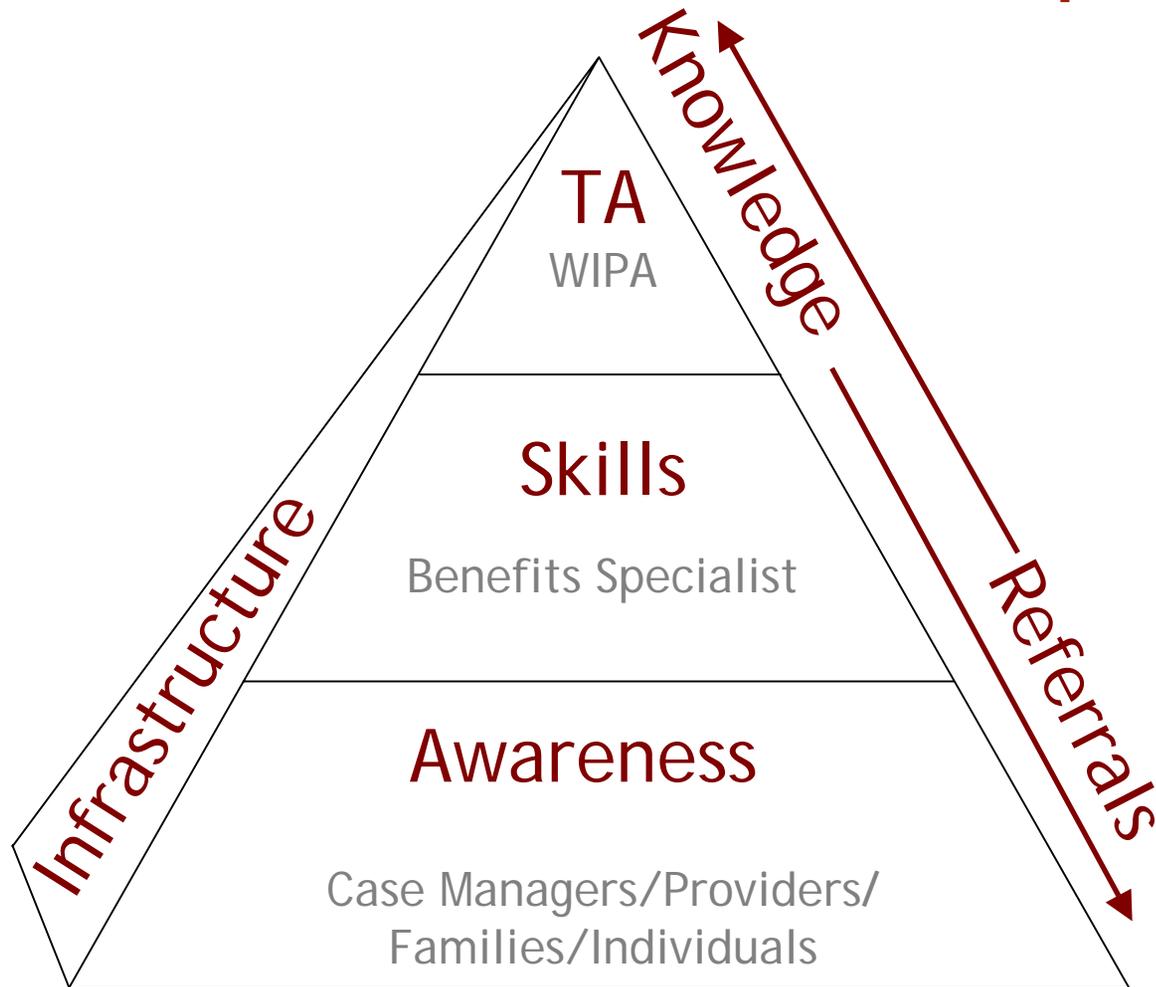
- Medicaid: Targeted Case Management 1905 (a); Medicaid Rehab Option 1905 (a) (13); Home & Community Based Services waivers 1915 (b) (3) and (c); DRA Benchmark plans 1937 (SSA); Money Follows the Person, Cash & Counseling; Aging & Disability Resource Centers
- Other federal sources: RSA (Title I), DD Act, DOL- DPN, IDEA, SAMHSA Mental Health Grants

What's Happening in New Hampshire?

- Do we know how many beneficiaries are interested in working?
- What percentage of beneficiaries won't work for fear of losing cash benefits?
- How many fear loss of healthcare?
- How many fear inability to go back to SSA if needed?
- What percentage will not earn above SGA?

Discussion

Proposal for Work Incentives Infrastructure in New Hampshire



Current Work Incentives Model in New Hampshire

Roles and Responsibilities:

Level 3 – WIPA

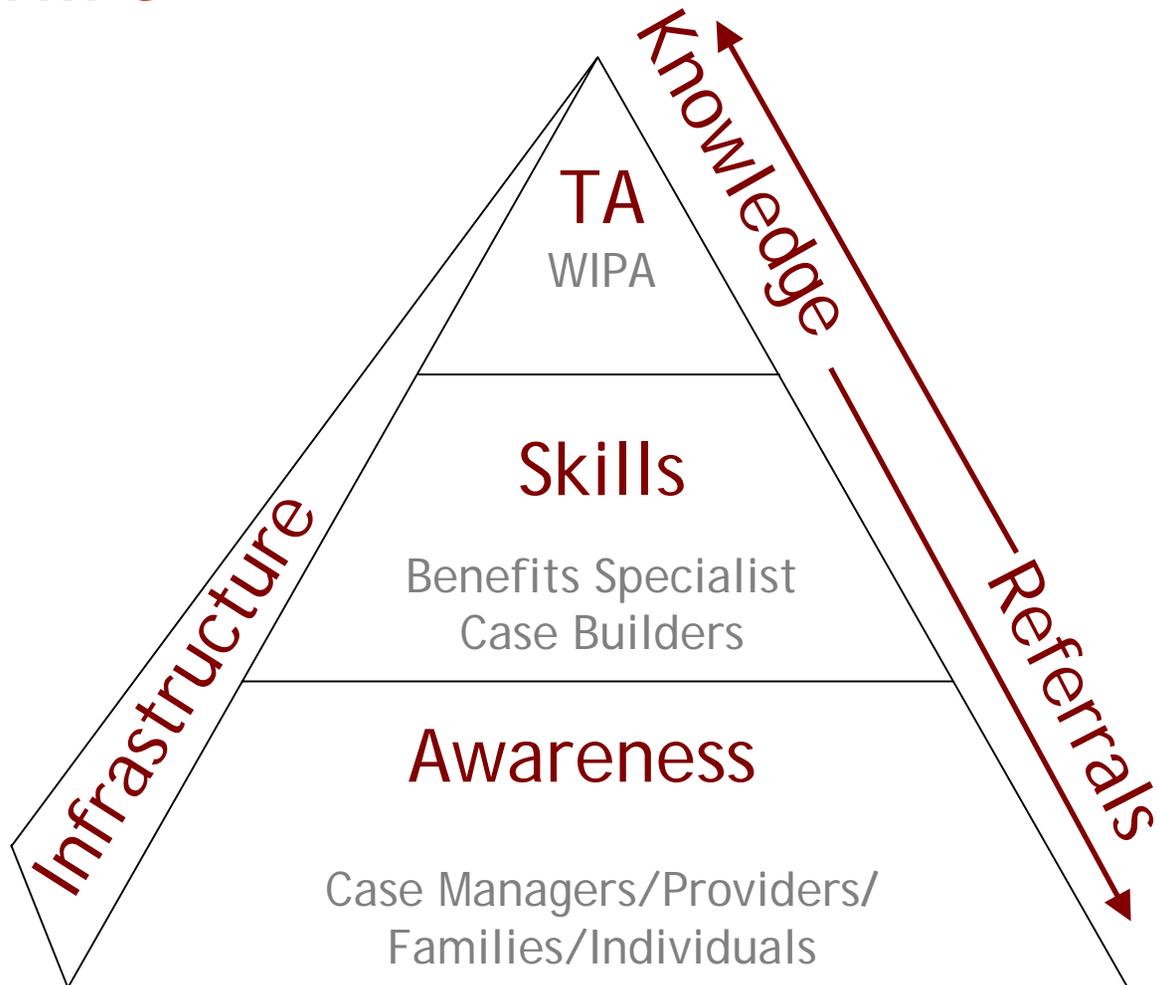
Over site
W. I. Counseling & Bene. Anal.
Consistency/Continuity
Quality
Information Updates

Level 2 – Case Builders

Benefits Management Support
Profiling Tool
Referral to WI Counseling & B.A.
Participate in BPG Network
Refer to Appropriate Benefits

Level 1 – Stakeholders

Support Consumers
Referral to Appropriate Benefits
Assist Consumers in Making Timely
reporting



Work Done to Date in supporting the WIPA Model

Review, Reflect, and Identify the different “functions” needed to meet NH infrastructure goals

- Discuss Quality Assurance Processes
- Create role expectations and responsibilities
- Create more efficiency in access and use
- Identify opportunities to measure success
- Talk about resources (people & dollars) necessary to sustain these activities

What have we learned from MIGs and other stakeholders and what have we accomplished?

We needed to build an understanding (AWARENESS) of the concepts and processes among the various stakeholders

We have delivered two day long trainings to build AWARENESS as well as 5 half day follow-up sessions for specific stakeholder groups. This work will continue in FY'09 in a broader geographic fashion

What have we learned from MIGs and other stakeholders and what have we accomplished?

We needed to clarify the difference between benefits counseling and work incentives counseling

We have taken significant steps to explain and demonstrate that there are very significant and real differences between those working with the title of “benefits counselors” and “Work Incentives Counselors”

What have we learned from MIGs and other stakeholders and what have we accomplished?

We needed to build the abilities and ownership (SKILLS) at the local level

The 1/2 day follow-up sessions are designed to increase the individual skill levels of participants and to position them with a higher skill level than those receiving AWARENESS trainings. A Web-Based “Profiling Tool” will be piloted, along with additional SKILLS training. This could allow local access to higher and more immediate levels of information about an individual’s unique and specific benefit situation. The Benefits and Work Incentives Planner (calendar) is available to those receiving Work Incentives counseling. The Benefits Planners Group meets monthly to address and develop the information and skills needs of the SKILLS Level staff.

What have we learned from MIGs and other stakeholders and what have we accomplished?

We need to develop clear role expectations and responsibilities

Each of the three levels of the pyramid will receive different information and training to maintain their level of expectation and responsibility. After participating, each level of the pyramid should recognize what to do with each specific benefits situation that they are faced with – who to refer to and when to refer

What have we learned from MIGs and other stakeholders and what have we accomplished?

We need to build in efficiencies for this model to operate effectively on a state wide basis

The pyramid model is designed to address efficiencies by increasing overall awareness in the various stakeholder groups, building specific skills and allowing for local controls. This model will operate under the expertise of specially trained WIPA staff who can provide oversight and system management to insure consistency, up-to-date information, continuity and quality service provision

What have we learned from MIGs and other stakeholders and what have we accomplished?

We will need to document that consumer participation in the process will produce better employment outcomes

We will need to develop and maintain a data tracking system to report the desired outcome information needed by the stakeholders

NH W.I. Model - Hybrid

Drawing from current resources and attempts to build a more efficient & effective model

Multi-layered

- Focuses on increasing general AWARENESS & understanding for multiple users
- Increases SKILLS for “Designated” staff or “Case Builders” through specific trainings and opportunities
- Creates a strong sense of how & when to use each level of the model
- On-going TA to identified entities and Case Builders

What Competencies are needed?

Lessons Learned Nationally

“BEST PRACTICES”

Ongoing analysis of need – all levels of training

Starting early to determine future funding structure and support

Stakeholder participation/knowledge/buy-in

TA and QA included as part of the design

Clear plan of the training responsibility & how to provide ongoing support and training to all levels of the employment infrastructure

Lessons Learned Nationally (continued)

Development of clear MOUs with delineation of roles & expectations for each level (of the “pyramid”)

Securing funding agreements across all systems involved – before you move forward

Building a “permanent” funding stream for WIPA infrastructure support

NH MIG Projects Supporting the following tools and outcomes

The pyramid model consolidates resources, designates them on a specific level, and delineates clear role expectations and responsibilities

Benefits & Work Incentive Planner – (Calendar)

Work Incentives Web Profiling Tool – Allows Skill Level “Case Builders” to assist consumers access WI services in the most efficient manner

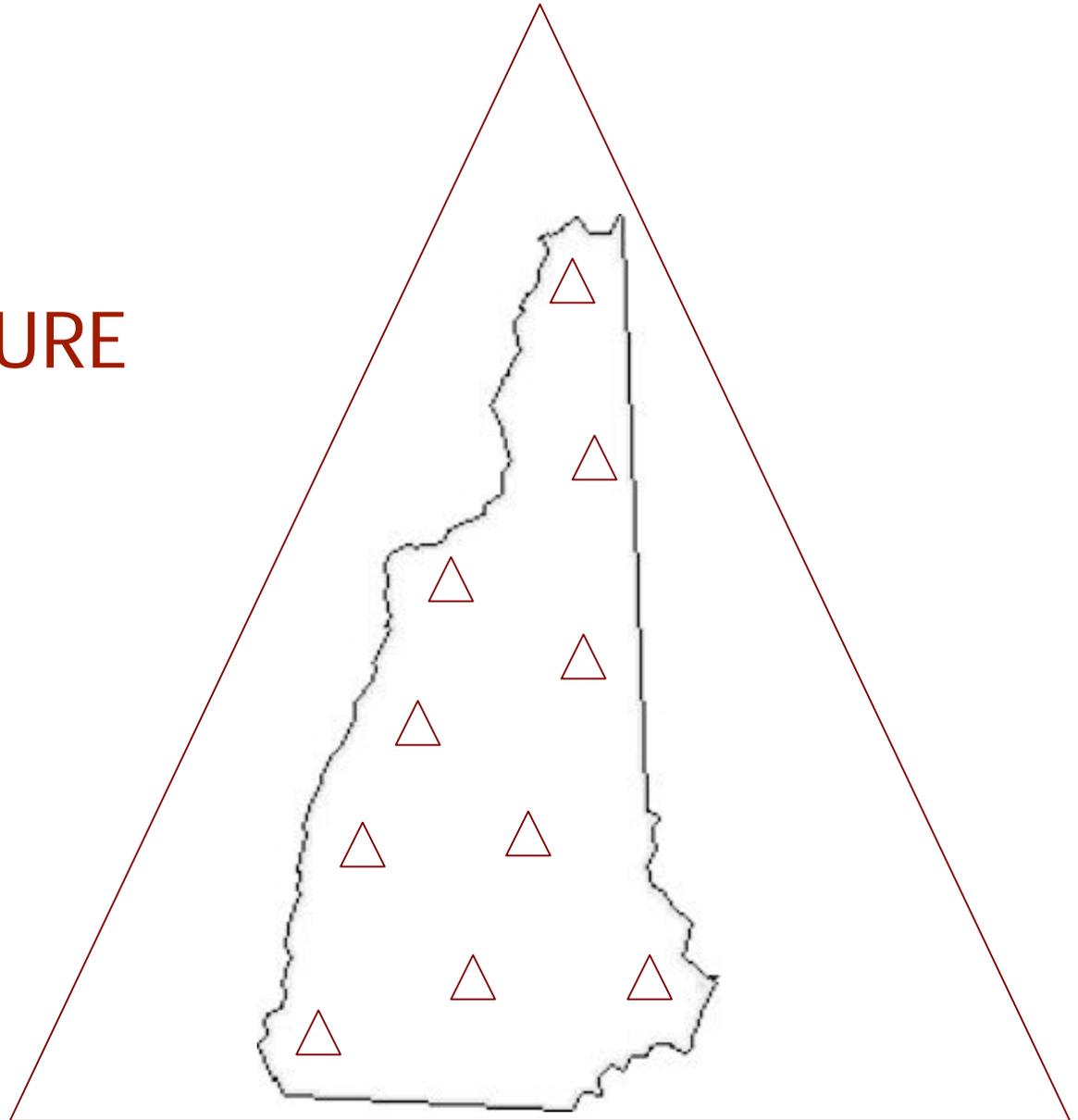
NH MIG Projects Supporting the following tools and outcomes continued

Benefits Planners Group – supports “Case Builder” skill levels, that then supports those at the Awareness Level

State wide pyramid concept supports regional/local pyramid actions and outcomes by operating and functioning on the local level

MIG - NH

Building an
employment
INFRASTRUCTURE
for tomorrow

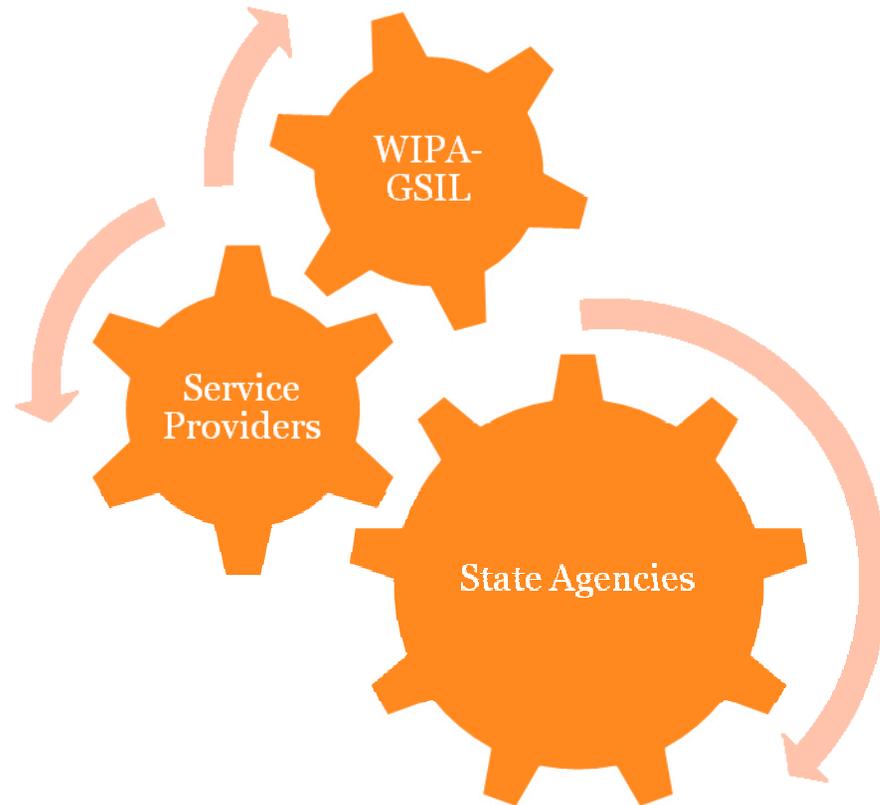


Feedback

- What do you think about the three tier model?
- Can we identify opportunities for moving forward?



Interdependent Moving Parts of A Comprehensive Employment System



Small Group Discussion: Big Picture

- What are the various entry points in the disability services system?
- Where is the “glue” that holds all of the different moving parts together? What does it look like?
- Who are the key players?

Small Group Discussion: What?

- What does a virtual resource center look like?
 - Who are the key partners?
 - Do we have existing funding for this virtual center?
- How will we know the virtual center is working?

Small Group Discussion: How?

- How do we get from where we are today to where we want to be by 2012?