

Utah's Comprehensive Employment Strategic Plan



In collaboration with
Utah Department of Health
Utah State Office of Rehabilitation
Utah State Office of Education
Utah Department of Workforce Services
Individuals with Disabilities
Employers

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Vision

Employment of individuals with disabilities is the common goal of agencies, providers and employers across the state of Utah. Becoming active participants of the community through employment is a goal of many individuals with disabilities as well. Achieving this common goal requires active participation at all levels by all stakeholders. A seamless system of comprehensive employment supports including health care coverage, is needed to help individuals with disabilities achieve integrated and competitive employment.

Since its inception in 2001, the Utah Work Incentive Network's (since renamed Work Ability Utah) primary goal has been goal to help people with disabilities find and retain competitive employment. This goal is being achieved through increased collaboration within and among agencies, the establishment of new programs such as the Medicaid Work Incentive, the Benefits Planning and Assistance program, the Employment and Personal Assistance Services and consumer and employer outreach.

Additionally, individuals with disabilities are benefiting from increased collaboration among agencies, expanded information sharing and improved public awareness. Job fairs and mentoring experiences are increasing in number and expanding in scope. Employers are committed to hiring individuals with disabilities as the expected business practice rather than the exception.

Drew and Miriam, Larry and Kenneth are each examples of individuals benefiting from the positive changes and opportunities in Utah. Here are their stories.

The Medicaid Work Incentive Program

Drew and Miriam are married with four children. Both experience mental illness that has affected their abilities to work. Two of their four children also have symptoms of mental illness. Good health care coverage is critical for their family. For their needs, Medicaid has the best health care benefits.

When they started on the Medicaid Work Incentive program, their average monthly expenditure was \$2,000 to \$2,500 for medication alone. They see their therapists 26 times per year, and Miriam attends Alliance House, a local mental health clubhouse. Medicaid pays for all these visits.

“It does give us access to quality health care that we’re not getting any other way.” --Drew

Drew said that if they were to get Blue Cross Blue Shield they would pay \$1,700 per month in co-pays for prescriptions alone.

Once Miriam started receiving Social Security Disability Insurance (SSDI), their income exceeded the threshold to continue receiving free Medicaid. To participate in the MWI program, individuals must pay a premium or “buy-in.” Participating in the MWI program has allowed them to keep the health care coverage they need.

Miriam and Drew work for Drew’s parents doing office and computer work that qualifies them to participate in MWI.

“The thing to celebrate, the thing to really see, is that we’re a long ways into this battle and we’ve had BIG, BIG victories and the work incentive changes people’s lives. If there would have been no buy-in we would have just been up a creek, there was no way we could get anything; we would have been without anything!” --Drew

“This program is now opening up access for more people to live healthier lives, which is going to get them back to work.” --Drew

The Benefits Planning Assistance and Outreach (BPAO)

Larry became disabled in 1979 at age 12. He has worked a few hours per week since 1989. He completed a diesel mechanic training program through Vocational Rehabilitation, but the biggest challenge for Larry was finding a job in his field.

“People with disabilities, it’s pretty hard...It’s real hard. ‘Cause, I went out, like I say, for two or three years, and [employers] find out you’re disabled and the search ends right then and there.” --Larry

Larry had just started a job with Turn Community Services, when Utah State Office of Rehabilitation referred him to a benefits specialist.

“She showed me what I can make, what my hours could be, what I can’t make, what I could do and what I couldn’t do and...if I had problems give her a call and she’d help me out.” --Larry

Larry said benefits planning helped him understand the benefits he was receiving and how working more hours would affect his Social Security and Medicaid benefits.

Larry accessed a work incentive, called a Subsidy, with Social Security. Larry also takes part in the Medicaid Work Incentive Program. He was pleased with his experience with the benefits specialist and the information she gave him.

Larry has a very positive attitude about life and working. He continues to work 18 hours per week at Turn Community Services, where he is a Recreation Assistant. He is happy with his job and with the number of hours he works.

“Don’t give up, keep trying, keep pushing on. That’s what kept me going” --Larry

Employment Personal Assistance Services

Kenneth, a full-time Community Advocate at the Utah Independent Living Center, has cerebral palsy and a fiercely independent spirit.

“I have worked so damn hard to get where I am today, to get off the government welfare system ... to pay back.” --Kenneth

Despite his strong sense of independence, he decided some personal attendant services would help him. If he were homebound, he could qualify for 60 home visits per year, through his insurance. Yet, he pointed out the irony that, if he were homebound, he would not be able to work to earn the money to pay the insurance premium.

Kenneth learned about the Employment Personal Assistance Services (EPAS) through personal connections. To get EPAS Kenneth had to apply and qualify for Medicaid. It was hard and humiliating for him.

He's experienced a lot of frustration jumping through the hoops of the system.

"There's a few bad apples that spoil the system for everyone, so we need to jump through these hoops...It's not fun going down on your knees and kissing their feet for a little bit of help." --Kenneth

Hoops or not, Kenneth enjoys the personal assistance he gets now. He chooses not to have any help at work. He said it is due to his stubbornness and he also wants to prove his "***manlihood.***"

But, after work he is too exhausted to do anything else. Having some assistance keeps him together.

Types of supports Kenneth receives at home from EPAS include shaving cheeks and neck, laundry assistance, loading /unloading the dishwasher, daily breakfast preparation, one weekly visit for meal preparation and cleaning and dividing meals into individual portions.

"Inside my head I want to see myself as Superman." -- Kenneth

These are just three examples of the positive impacts in the lives of individuals with disabilities who benefit from the changes occurring across the state of Utah through the efforts of Work Ability, agencies and employers. The quality of life for individuals with disabilities is improving through employment, and the incentives are in place to pursue employment.

Utah is working to expand employment opportunities for individuals with disabilities. As this occurs, it is necessary, to retain the vision of increased integrated and competitive employment, as well as to understand the many efforts in place which form the strong foundation and structure by which these activities are sustained. Only by taking a collaborative approach will the vision be realized.

Overview of Strategic Plan Document

The following document summarizes the strategic planning efforts of the past year focusing on the key aspects that resulted in the Work Ability project goals. The Environmental Analysis reviews the key players identified in the planning process, existing collaborative efforts, and the strengths in the current system. The Summary of the Strategic Planning Process section summarizes the actions taken during 2005 to identify the critical issues facing the project and the efforts taken to further clarify them. A table clearly encapsulates the issues and how they were identified. As a result of the Strategic Planning Process, specific individual and system outcomes have been established and are summarized in the section, the Goals of the Work Ability Project. The Project Evaluation section reviews the efforts that will be taken to measure the number of individuals served by the target programs who obtain and retain competitive employment, as well as measuring the systems change results. The final substantive action focuses on how employment efforts will be sustained.

Environmental Analysis

Utah businesses have made it clear that a strong workforce is needed. Members of the Chamber of Commerce consistently express a need for a trained and willing workforce. A major untapped resource is individuals with disabilities who desire to work. At the same time, the Utah State Office of Rehabilitation has as its primary goal employment of people with disabilities. Local school districts provide required transition training as students near exiting from the public education system. Clearly, it is an opportune time for employers, agencies, schools and individuals with disabilities to

come together to realize this common goal of employment. The Work Ability project is a catalyst to facilitate and promote this goal.

Agency Leadership

The Work Ability Executive Board is composed of four partners, the Department of Health's Division of Healthcare Financing (Medicaid), the Department of Workforce Services (DWS), the Utah State Office of Rehabilitation (USOR) and the Utah State Office of Education Special Programs (USOE). Three of these partner agencies are also represented in a larger organization, the Coordinating Council for Persons with Disabilities (CCPD), which provides leadership for all services for individuals with disabilities in Utah. The CCPD is composed of the agency leaders from the following: the Division of Services for People with Disabilities and the Division of Mental Health, within the Department of Human Services, the Division of Health Care Financing and Division of Community and Family Health, both within the Utah Department of Health, the Utah State Office of Rehabilitation, the Utah State Office of Education, Special Programs, and the Utah Schools for the Deaf and the Blind, in addition to an individual with a disability or an advocate as appointed by the other members. The statutory purpose of the CCPD is to provide leadership and coordinated supports for individuals with disabilities. Each of these member agencies have its own advisory council or board which includes members with disabilities. While the Department of Workforce Services (DWS) is not a statutory member of the CCPD, it is now the intent to include DWS within the CCPD's dialogue on employment. The CCPD is a tremendous resource to both the Work Ability project and the entire arena of employment for individuals with disabilities in Utah.

Utah Department of Health: Division of Health Care Financing – Utah’s Medicaid Agency, Michael Hales, Interim Director

The Division of Health Care Financing (HCF) in the Department of Health oversees Utah’s Medicaid policy, claims and eligibility. The Division of Health Care Financing administers the Medicaid Infrastructure Grant which began in October 2000. Utah’s MIG was initially called the Utah Work Incentive Initiative and was later renamed Work Ability. The Work Ability project coordinated development of a Medicaid Buy-in and expansion of personal assistance services for people with disabilities who work, developed training curricula and provided training to both consumers and professionals, and developed an employer-focused information campaign via the creation of an interactive CD and a series of paid radio spots on commercial radio stations statewide.

Utah State Office of Rehabilitation: Blaine Peterson, Executive Director

The Utah State Office of Rehabilitation (USOR) administers vocational rehabilitation (VR) services through two divisions: Rehabilitation Services and Services for the Blind and Visually Impaired. National program data shows the Utah VR programs are the most productive and cost-effective programs among the ten surrounding intermountain states. In 2004 Utah’s VR program, including services to the blind and visually impaired, served a total of 25,397 individuals of whom, 2,881 were successfully rehabilitated into employment. Also 534 Social Security disability recipients (SSI and SSDI) were successfully rehabilitated and 57 individuals received time-limited supported employment services through USOR in 2004.

USOR oversees services for individuals who are deaf and hard of hearing through the Division of Services for Deaf and Hard of Hearing and operates the Sanderson Community Center for the Deaf and Hard of Hearing. USOR also oversees

services for individuals who are blind or visually impaired through the Division of Services for the Blind and Visually Impaired. USOR sets policy and monitors the delivery of Independent Living Services Part A and Part C (services for older blind individuals) programs. Services are delivered through independent living centers.

Utah Department of Workforce Services: James Whitaker, Director of Operations Support

Utah's Department of Workforce Services (DWS) operates 37 one-stop employment centers statewide, serving both employers and job seekers, and offers work support services including Medicaid Eligibility, Food Stamps, Child Care and Temporary Assistance to Needy Families (TANF). DWS administers the Wagner-Peyser, Workforce Investment and Unemployment Insurance programs.

Utah State Office of Education: Karl Wilson, Director of Special Programs

The Utah State Office of Education (USOE) oversees Utah's system of K-12 public education. The USOE Special Programs Section is responsible for monitoring programs under the Individuals with Disabilities Education Act. USOE has a Transition Specialist who coordinates training and technical assistance to special education personnel in the schools. Through a system of support to Local Education Agencies, public schools provide transition planning to students eligible for special education. A system of transition planning is offered in all high schools in the state, where schools work with vocational rehabilitation, community support agencies and employers to offer students with disabilities, and their parents, preparation for the world of work and life after high school.

Partnerships

In addition to the four agencies providing statewide leadership governance to Work Ability, individuals with disabilities, public agencies and employers constitute the Work Ability Coalition, providing input and guidance to the Work Ability project activities. Work Ability Coalition members are committed to the belief that people with disabilities can make significant contributions to the economic success of the State of Utah through employment and that employment can be an integral part of the fuller inclusion and life development of individuals with disabilities. The Coalition is responsible for monitoring the progress of the strategic plan. The key stakeholders, in addition to the four partner agencies include:

- Individuals with disabilities
- Employers
- Utah Department of Human Services, Division of Services for People with Disabilities (DSPD)
- Division of Substance Abuse and Mental Health
- Community Mental Health Centers
- Clubhouse Programs
- Independent Living Centers
- Utah Center for Assistive Technology (UCAT)
- Disability Resource Centers in Higher Education
- Social Security Administration
- Utah's Disability Law Center
- Utah's Developmental Disabilities Council
- Salt Lake Community College, Center for Human Services Training
- Governor's Committee on Employment for People with Disabilities
- Salt Lake Chamber of Commerce
- Utah Business Employer Team
- Community Rehabilitation Programs

Collaborative Planning Efforts

Many collaborative strategic planning activities to increase employment for individuals with disabilities are occurring across Utah. Several existing committees and programs have a renewed focus on improving the system of employment supports in

Utah. In addition, several new initiatives have been started within the last 18 months in collaboration with the Work Ability planning process.

EXISTING COMMITTEES AND PROGRAMS WITH RENEWED FOCUS

New Futures Supported Employment Committee The Coordinating Council for People with Disabilities (CCPD) established a state level workgroup called the New Futures Supported Employment Committee, which is co-chaired by Division for Services for People with Disabilities (the DD/MR agency) and Vocational Rehabilitation Supported Employment coordinators. This committee was organized in 1992 and charged with improving communication, collaborative problem-solving, providing training and technical assistance, and encouraging and supporting continuous quality improvement at all levels. This committee makes recommendations to respective agencies about issues related to Supported Employment.

The Memorandum of Understanding to Support Employment (MOUSE) Committee The MOUSE Committee was established in November 2001 to implement the Utah Workforce Service System Memorandum of Understanding and addendum Cooperative Agreement between the Utah State Office of Rehabilitation (USOR) and Department of Workforce Services (DWS). Active since inception, the purpose of the committee is to provide policy and guidelines to better serve joint customers with disabilities. The committee has five sub-committees where coordination and partnering is essential to service joint customers with disabilities. Each sub-committee is co-chaired by USOR and DWS staff and addresses the areas of pathways, information systems (data sharing), cross training, employer relations, and program and physical accessibility.

Choose to Work Established in November 1998, Choose to Work services are provided through a partnership agreement between the Utah State Office of Rehabilitation (USOR) and Department of Workforce Services (DWS). Choose to Work services are directed at successful and competitive employment outcomes for Utah job seekers with significant disabilities. These outcomes are achieved through individualized and specialized job development and placement by employment specialists. These 22 specialists are located statewide and function in true partnership, with some being employed by USOR and others by DWS, with the same objective of employment placement for people with disabilities requiring specialized placement needs.

Governor's Committee on Employment of People with Disabilities The mission of the Governor's Committee is to promote public and private efforts to achieve equal employment opportunities for all qualified Utahns with disabilities. Members are appointed for a four-year term and represent business and industry, individuals with disabilities, job training and placement personnel, state agencies, veterans, media and the general public. The Committee has focused on two main projects: 1) facilitating the development, implementation and coordination of local Business Leadership Networks; and 2) fostering cooperative working relationships among state agencies, public and higher education, providers, and organizations to address workplace preparation for transition-age youth and other students with disabilities. A business leadership network has been established within the Salt Lake Chamber of Commerce with others on the horizon within the Ogden and Davis Chambers of Commerce.

The Utah Association of Persons in Supported Employment (UAPSE)

UAPSE is a membership organization formed in 1991 to help improve and expand integrated employment opportunities, services, and outcomes for persons experiencing significant disabilities. The organization provides advocacy and education to customers of supported employment (SE), supported employment professionals, consumers and their family members, and employers. Members meet to address issues and barriers which impede the growth and implementation of integrated employment services and work to improve supported employment practices so that individuals and communities experience quality service supported employment with meaningful outcomes.

Members of the UAPSE organization recommend national, state, and local policy development which enhances the social and economic inclusion and empowerment of all persons experiencing severe disabilities. In coordination with the National Association of Persons in Supported Employment (APSE), UAPSE works to educate the public and the business community on the value of including persons experiencing severe disabilities as fully participating community members.

RECENT NEW INITIATIVES

Training and Education Sub-committee As a result of the information gathered from the employer focus groups sponsored by the Governor's Committee on Employment of People with Disabilities in 2003, a sub-committee was formed to foster cooperative working relationships among state agencies, public and higher education, providers, and organizations. The sub-committee is to address workplace preparation for transition-age youth and other students with disabilities. The sub-committee

organized and planned focus groups with parents, students, educators and employers relative to workplace preparation for students in transition from school to work.

The overall message from the focus groups regarding the development of effective school to work transition programs was: Students must have real life experiences in the community in real job settings. The Governor's Committee is now facilitating the development of a partnership between the Utah Business Employer's Team and educators to establish and sustain this critical connection to employment. The vision is that educators and employers will together tackle the issues facing all students with disabilities. Doing so will provide a talented, work ready labor pool from which employers can recruit.

Utah Business Employers Team (UBET). UBET is the Business Leadership Network arm of the Salt Lake Chamber of Commerce. It is an employer-led coalition operating within the Salt Lake Chamber that assists businesses to attract new employees and customers with disabilities. It provides an opportunity to share best practices with other business leaders and organizations and to exchange information on current laws, benefits, issues and opportunities. UBET utilizes the talents and expertise of its members to provide seminars on subjects relevant to the employment of qualified people with disabilities. It provides valuable connections to various disability community organizations that can refer and support job candidates at the workplace. UBET also offers information for on-site evaluations and recruitment solutions to workplace needs.

Benefits Planning Assistance and Outreach In addition to the training and technical assistance provided within Work Ability, three state agencies and one public mental health agency have hired full time benefits specialists. These specialists provide

benefits counseling services to individuals who receive Social Security disability benefits (SSDI and SSI) to help them make informed choices about working. The State Office of Rehabilitation, the Department of Workforce Services, the Division of Services for People with Disabilities and Valley Mental Health have each not only seen the value of benefits planning, but have included permanent positions within their current administrative structure. The Office of Rehabilitation is also seeking additional staff through the 2006 legislative funding process. A total of four full-time Benefits Specialists and 50 Benefits Planners have been trained and are currently providing a wide range of services to individuals with disabilities in Utah.

Utah State Office of Education Transition Team In an on-going effort to improve post-school outcomes for students with disabilities, the National Center on Secondary Education and Transition (NCSET) sponsored the 2005 National Leadership Summit on Improving Results: Policy and Practice Implications for Secondary and Postsecondary Education, Transition, and Workforce Development for Youth with Disabilities. States were invited to send teams to Washington, D.C. in June, 2005, to work on individual states' priorities for improved secondary education experiences and post school outcomes for youth.

The Utah team consisted of five members representing Utah State Office of Education (USOE), both Special Education and Career Technical Education (CTE), Utah State Office of Rehabilitation (USOR), and the Utah Parent Center. After completing a pre-Summit self-assessment, the team determined two priorities: improving career preparatory experiences to improve post-school employment options; and increasing student leadership skills. To meet the first goal, improving career

preparatory experiences, the team has reviewed data to determine participation of students with disabilities in CTE classes and will continue to use that data to develop ways to increase the involvement of students in Work Based Learning opportunities, as well as CTE classes. To address the second goal, the USOE will issue an RFP to local education agencies for development of a program to increase leadership skills in students with disabilities, in the school and in the community. This grant will be funded with IDEA discretionary funds.

Employment Symposium of People with Disabilities Because of the many challenges facing individuals with disabilities in employment, representatives from New Futures Committee formed a committee to discuss improving employment outcomes for people with disabilities. The committee includes the Utah State Office of Rehabilitation, Work Ability, the Governor's Committee on Employment of People with Disabilities, the Department of Services for People with Disabilities, the Center for Human Services Training at the Salt Lake Community College, and various human service providers. This diverse group decided that Utah would benefit from an organized discussion on employment of people with disabilities. The organizing committee decided that a traditional conference on employment of individuals with disabilities would not adequately address the needs of employers and people with disabilities. Instead, in August 2005, the committee held a two-day Symposium on Employment of People with Disabilities. The 2005 Symposium was conceptualized as a platform for dialogue among employers, parents, individuals with disabilities, educators, human service providers, and key policymakers to discuss how to improve employment outcomes for

people with disabilities in Utah. This Employment Symposium is intended to be an annual event in the future.

The Utah Work Incentives Self-Employment Project (UWISE) This initiative seeks to create an effective infrastructure to expand self-employment opportunities for individuals with disabilities living in Utah. Sponsored by the Utah Statewide Independent Living Council and the Association for Independent Living of Utah, UWISE began in late 2003 to research existing services focused on entrepreneurship for individuals with disabilities, consider additional services needed to make self-employment a viable option for this population statewide, and develop a strategy to maximize collaboration and put in place the complete array of essential supports. Key partners comprise the UWISE Steering Committee, including Work Ability, the Small Business Administration, the Utah Department of Workforce Services, the Utah State Office of Rehabilitation, and the Disability Law Center. UWISE is staffed by Walsh & Weathers Research and Policy Studies. During FY 2005, the Department of Labor, Employment and Training Administration is funding the “Choose-to-Work Self-Employment Pilot” project that is furthering UWISE goals. Ten individuals with disabilities living in selected rural and urban areas of the state are being assisted to pursue their self-employment goals.

SSDI Benefit Offset Pilot Demonstration The Utah Department of Health has contracted with the Social Security Administration (SSA) to operate the SSDI Benefit Offset Pilot. Utah is one of only four states that has been selected to implement this pilot. The Pilot’s goal is to evaluate the implementation and outcomes of changes in Social Security Disability Insurance (SSDI) policies that may limit an individual’s

willingness to consider increasing their work effort and hence their income. Specifically, the project will test a gradual reduction in benefits to replace the so-called ‘cash cliff.’ The “cash cliff” is the complete loss of Social Security Disability Insurance (SSDI) for individuals who earn over Substantial Gainful Activity (\$860 or \$1450 if blind) after the completion of a Trial Work Period. The four Pilot projects will inform a national demonstration project that will be implemented in 2007.

The Utah SSDI ‘1 for 2’ Project will enroll 500 beneficiaries in the pilot. Half of the enrollees will be randomly assigned to an intervention group (“Pilot Rules Group”). This group will receive a \$1 reduction in benefits for every \$2 they earn over SGA in a month. This benefit will last for a 72-month extended period of eligibility (double the current EPE). Additional waivers of existing SSA policies – such as not starting a medical Continuing Disability Review during this period – will also support employment efforts for those in this group.

The other half of the enrollees will be assigned to a control group (“Current Rules Group”) and will experience no change in the work incentive rules. The experimental design of this pilot will help in the evaluation of whether these new rules should apply to all SSDI recipients. All project enrollees will be offered benefits counseling so they understand the impact of earnings on their benefits

Utah’s Integrated Services Project This project addresses needs identified nationally and locally related to the six Maternal and Children (MCH) components. They are: 1) family/professional partnerships at all levels of decision-making, 2) access to comprehensive health and related services through the medical home, 3) early and continuous screening, evaluation and diagnosis, 4) adequate public and/or private

financing of needed services, 5) organization of community services so that families can use them easily, and 6) successful transition to all aspects of adult health care, work and independence. This project is a collaboration among the Utah Bureau of Children's Special Health Care Needs, Utah Division of Health Care Financing (Medicaid), Utah Chapter of the American Academy of Pediatrics, University of Utah Department of Pediatrics, Utah State University and Utah Family Voices. The Project will collaborate with "Utah Clicks," Utah's on-line access for families to access applications for WIC, Medicaid, BabyWatch/Early Intervention, Baby Your Baby and Children with Special Health Care Needs programs. Increased family/professional partnerships, enhanced screening services, and more successful transition services will reflect broad Project success.

United We Ride United We Ride is an interagency Federal national initiative that supports states and their localities in developing coordinated human service delivery systems. Human service transportation includes a broad range of transportation service options designed to meet the needs of transportation disadvantaged populations including older adults, individuals with disabilities and/or those with lower income.

Located within the Utah Department of Transportation, United We Ride is a coalition of agencies, community providers and consumers. The managing committee is currently developing a statewide coordination plan (Action Plan) to address the many transportation needs. Though now in the early stages of development, the committee will address both rural and urban issues, as well as the need for transportation to travel to and from employment.

Strengths in the current system

Clearly there are great many positive and productive efforts occurring in Utah. The projects and efforts have resulted in improved health care coverage and employment supports to individuals with disabilities in Utah. The following highlights some of the achievements.

The Medicaid Work Incentive (MWI - the Buy-In) enables Medicaid recipients with disabilities to increase their work effort and accumulate assets while continuing to receive needed health care benefits. This program has increased enrollment from 243 individuals in December 2004 to 351 in December 2005, an increase of nearly 30%.

The Medicaid Employment Personal Assistance Services (EPAS) program allows individuals who work at least 40 hours per month and require personal assistance to work because of their disability, to receive the personal help they need at home and/or at the job site. EPAS can provide help with personal needs such as bathing, dressing, eating, transferring, shopping, cooking, money management, cognitive cueing and transportation to enable people with disabilities to work in an integrated competitive job setting. EPAS has continued to expand from 32 individuals participating in December 2004 to 59 individuals in December 2005, an increase of over 80%.

The Benefits Planning Assistance and Outreach program (BPAO) has continued to expand. The Benefits Planning Network is comprised of 3.0 FTEs within the Utah State Office of Rehabilitation, 2.0 FTEs within the SSDI '1 for 2' project, one each in a mental health agency and the Division of Services for People with Disabilities, as well 50 part-time benefits planners located in various organizations and providers across the state. The State Office of Rehabilitation is seeking legislative funding for 2 additional FTEs for the Utah BPAO program. Within USOR alone, over 600 referrals were made

in 2005, resulting in 328 completed benefits plans for individuals seeking or increasing employment.

Outreach, training and public awareness have been coordinated among the various agencies with the Work Ability Project taking the lead. A common source of materials has been developed and is used by the Work Ability staff, trainers from USOR, Utah State University and the Area Work Incentive Coordinator (AWIC) from Social Security. These materials include a CD which contains information for both employers and consumers. Employers gain information on the benefits of hiring people with disabilities, tax incentives, the Americans with Disabilities Act, work site accommodations and office etiquette. For job seekers with disabilities, the CD discusses how to find a job, testimonials from people with disabilities who are successfully working, and the services available. Posters, postcards, a website and radio campaign continue to raise awareness of employment for individuals with disabilities.

Within the Utah Department of Health (UDOH), employment has not always been viewed as an outcome for consumers. Housed within UDOH, Work Ability has developed relationships and networked to foster the goal of employment as a viable option for people with disabilities. Standard training of Medicaid eligibility workers now includes work incentives, including MWI, EPAS and BPAO. The training and communication relationship is reciprocal with both Work Ability and Medicaid trainers calling each other as programs change to offer and request support.

Partnerships among employers, as well as with the organizations such as the Governor's Committee on Employment of People with Disabilities and the local

Chambers of Commerce, have resulted in increased information sharing, the development of a model of business-to-business supports, and enhanced understanding of disabilities and why the hiring of individuals with disabilities makes good business sense.

Clearly a great deal is happening in Utah! As a result of the many efforts and collaboration, individuals with disabilities are pursuing employment, agencies are providing needed supports and employers are seeking more applicants from the available pool of individuals with disabilities. However, challenges remain.

Summary of Strategic Planning Processes

The State of Utah has been engaged in a strategic planning process to develop a plan for the next three years of the Comprehensive Employment Infrastructure grant and beyond. During 2005 the Work Ability staff and other stakeholders gathered data and held planning sessions to identify critical issues and analyze factors that impact each of the identified issues.

At the start of the process several critical infrastructure issues were identified that became the focus for further planning efforts. These issues were selected as the most salient for further development following the first four years of Utah's Medicaid Infrastructure Grant. The first three issues pertain to sustaining employment incentive and support programs developed since 2001. The remaining issues pertain to areas that were not addressed during the first MIG project. These latter six issues became the focus of intense needs and resource analyses and strategic planning activities during 2005. The critical issues are:

- How to sustain and improve Utah's Buy-In, the Medicaid Work Incentive (MWI) program.
- How to sustain and improve the Medicaid Employment Personal Assistance Services (EPAS) program.
- How to sustain and improve Benefits Planning Assistance and Outreach services.
- How to connect job seekers with disabilities to employers and jobs;
- How to change systems so individuals are better prepared for jobs in a changing job market.
- How to connect employers with suitable workers with disabilities and provide supports for appropriate and needed accommodations.
- How to test and improve new electronic career and job seeking tools for accessibility to people with disabilities.
- How to improve employment options for students with disabilities in transition from school to work by improving the conversations between schools and local employers.
- How to impact the cultural expectations around working for people with disabilities.

The strategic planning processes first involved efforts to further clarify and define these critical issues. For some issues these processes were initiated by Work Ability staff, in others the staff collaborated with agencies that were engaged in similar planning efforts. A second step was to identify resources in the state – programs, agencies, projects, funding capacity, etc. -- that were available to address the issues. A

third step was to articulate measurable objectives that would become the focus of the Work Ability project over the next three years. Gathering this key information from all stakeholders provided greater insight into the needs of each group, particularly the needs of individuals with disabilities and employers. A summary of the various strategic planning efforts is contained in Table 1. Logic Models describing the major project objectives can be found in Appendix A.

Table 1: Summary of Strategic Planning Process for a Comprehensive Employment Infrastructure

Critical Issues	Planning Events / Processes	Event Dates	Reports	Documents
Medicaid Work Incentive Program (Work Plan Objective 1)				
How to sustain and improve the Medicaid Work Incentive program	Analysis of Utah Medicaid Administrative Data from 2001 and 2004	February 2005	Patterns of Quarterly Wages of Utah MWI Participants	www.workabilityutah.org/uwin/webpage/products/MWI_Qrtly_wages-Final-2-24a.pdf
		February 2005	Employment of Medicaid Disability Recipients	www.workabilityutah.org/uwin/webpage/products/Medicaid_disability_employment-final3-10.pdf
	Telephone survey and select interviews with Medicaid recipients	December 2004 – November 2005	Experiences and Outcomes of the Utah Medicaid Work Incentive Program: Summary of Findings of the Telephone Survey of MWI Participants Conducted December 2004 and January 2005 Work Ability: MWI and EPAS Logic Model Appendix A	**Report not yet posted
Employment Personal Assistance Services (Work Plan Objective 1)				
How to sustain and improve the Medicaid Employment Personal Assistance Services (EPAS) program.	Administrative data analysis and survey of EPAS participants and program case managers	November 2004	Employment Personal Assistance Services (EPAS) Evaluation Report Work Ability: MWI and EPAS Logic Model Appendix A	http://www.workabilityutah.org/uwin/webpage/products/EPAS_Final3-20.pdf

Critical Issues	Planning Events / Processes	Event Dates	Reports	Documents
Benefits Planning Assistance and Outreach Services (Work Plan Objective 2)				
How to sustain and improve Benefits Planning Assistance and Outreach services.	Administrative data analysis and survey of BPAO participants	July 2004 - January 2005	Outcomes from the Consumer Survey of the Utah Benefits Planning Assistance and Outreach Program	www.workabilityutah.org/uwin/webpage/products/BPAO_survey_report_jan05.pdf
	Survey of benefits planning providers in the Utah Benefits Planning Network	December 2004	Survey of Participants in the Utah Benefits Planning Coalition	www.workabilityutah.org/uwin/webpage/products/BPAO_TAsurvey%20_final.pdf
	BPAO Work Group Logic Model Development	June 2005		BPAO Logic Model Appendix A

Critical Issues	Planning Events / Processes	Event Dates	Reports	Documents
Workforce Development (Work Plan Objective 3)				
<p>How to connect job seekers with disabilities to employers and jobs</p> <ul style="list-style-type: none"> • How to change employment support systems so individuals are better prepared for jobs in a changing job market. • How to connect employers with suitable workers with disabilities and provide supports for appropriate and needed accommodations • How to test and improve new electronic career and job seeking tools for accessibility to people with disabilities. 	Supply-side Steering Committee; planning group to define "supply-side" initiative	July-October 2005	Defining Infrastructure to Connect People with Disabilities and Employers (D.Baer Report)	www.workabilityutah.org/uwin/webpage/products/DefiningSupplySideRpt.pdf
		October 2005		Workforce Development Logic Model Appendix A
	6 focus groups with employers by industry- Retail, Hospitality, Manufacturing, Health Care, Call Centers, Technology	April 2003	Employer Perceptions of Need When Hiring and Retaining People with Disabilities	www.workabilityutah.org/uwin/webpage/products/EmployerFocusgroup_Apr2003.pdf
	Utah Business Employer Team (UBET) executive committee strategic planning	October 2004	Mission, Vision and Values statement for UBET Committee (Salt Lake Chamber of Commerce)	
	2-day symposium among employers, employment service providers, educators, and consumers on improving employment outcomes for people with disabilities	August 2005	2005 Utah Symposium on Employment of People with Disabilities-Aug 16-17	www.workabilityutah.org/uwin/webpage/products/2005Utahsymposiumonemploymentof.pdf
	4 focus groups with employers, educators, parents and students with disabilities – focusing on transition	October 2005	Transition from School to Work for Students with Disabilities in Utah: Focus Groups with Employers, Educators, Parents & Students, October 2005	www.workabilityutah.org/uwin/webpage/products/TransitionFGreportFinal.pdf

Critical Issues	Planning Events / Processes	Event Dates	Reports	Documents
Transition (Work Plan Objective 4)				
How to improve employment options for students with disabilities in transition from school to work by improving the conversations between schools and local employers.	4 focus groups with employers, educators, parents and students with disabilities – focusing on transition	October 2005	Transition from School to Work for Students with Disabilities in Utah: Focus Groups with Employers, Educators, Parents & Students, October 2005	www.workabilityutah.org/uwin/webpage/products/Transition FG report Final.pdf Transition for Youth Logic Model Appendix A
Work Ability Campaign (Work Plan Objective 5)				
How to impact the cultural expectations around working for people with disabilities	Planning and development of the Work Ability campaign - media and public relations activities	June 2001 -	Work Ability: Opening Doors to Work for People with Disabilities – A guide for employers and people with disabilities	www.workabilityutah.org/index.htm
	April-November 2005	Work Ability Executive Board planning meetings	Minutes of Executive Board meetings	www.workabilityutah.org/uwin/webpage/minutes.htm
Collaboration (Work Plan Objective 6)				
How to collaborate with and support other Utah initiatives for employment.	Focus groups and continued discussion evidences continued need for collaboration with other initiatives	February 2005 -	Meeting minutes	

As a result of the Strategic Planning process, specific issues emerged. Because of the extent of concern by all parties, it has become clear that the Work Ability project must broaden its scope past current programs such as the MWI, EPAS and BPAO models. The success of these programs is evidenced by the number of individuals pursuing employment. Increased effort must now be made with transition aged youth and the local schools, as well as with employers. Efforts must be made to sustain all efforts and maintain the commitment of all agencies and partners into the future.

Goals of the Work Ability Project

The collaboration by all stakeholders to achieve successful, integrated and competitive employment for Utahns with disabilities is clearly evidenced by the many simultaneous planning efforts and actions. In addition to being a catalyst and champion of this vision, Work Ability can also conduct many activities within its own scope.

Individual Outcomes: From December 2004 through December 2008, the Work Ability Project has a goal to support 800 more individuals with disabilities in their efforts to find and/or retain competitive employment.

System Outcomes: The Work Ability project will achieve the individual level outcomes through systems changes within and among the Utah State Office of Rehabilitation (USOR), Department of Workforce Services (DWS), Utah Department of Health (DOH), Utah State Office of Education (USOE), high schools and post secondary schools, employers and individuals with disabilities. The following objectives and activities form the work plan that will guide the project over the next three years.

Objective 1: Increase employment by individuals with disabilities through sustaining and improving the Medicaid Work Incentive (MWI) and Employment Personal Assistance Services (EPAS) programs.

- 1) Conduct outreach to individuals eligible for Medicaid who are working
 - a) Explain to current and potential recipients the features of MWI and EPAS that are incentives to working
 - i) MWI - \$15,000 asset limit; approximately half of all earned income is not counted in premium calculation; access to health care as supplement to employer sponsored health coverage
 - ii) EPAS – supports for working people with disabilities who need help with Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs)
 - b) Explain changes in prescription drug coverage as a result of Medicare Part D
- 2) Evaluate use of MWI and EPAS programs
 - a) Conduct analyses of administrative data including wages to assess changes in wages and other outcomes, costs
 - b) Analyze enrollment by geographic region to assess if there are regional differences
 - i) Follow-up with training for eligibility workers in areas that show low enrollment
 - ii) Train Vocational Rehabilitation (VR) staff on Medicaid programs annually via EdNet
 - c) Qualitative analysis of EPAS, e.g., consumer satisfaction and employment stability
 - d) Recommend changes in policy if analysis indicates problems
- 3) Refine provider and procedure manuals for EPAS program
 - a) Delineate all EPAS procedures
 - b) Amend administrative rules for EPAS program to define “competitive, integrated employment”
 - c) Publish rules through state rulemaking process; hold hearings; finalize rules
- 4) Work with other state personal assistance programs (Real Choice grant, IL Nursing Home Transition, Aging Services, Independent Living Centers) to address Personal Assistance Services (PAS) program issues
 - a) Recruitment, retention and training of direct service personnel

- b) Expand providers of fiscal intermediary services
- c) Establish a registry of PAS providers available by geographic area

Objective 2: Sustain and improve the Benefits Planning Assistance and Outreach (BPAO) program to enable individuals receiving Social Security Administration (SSA) disability benefits to make informed choices about working.

- 1) Provide training and mentoring to benefits planners in order to increase the supply and improve quality of benefits planning services.
 - a) Technical Assistance (TA) Specialist to provide TA to new and existing benefits planners
 - i) TA Specialist will conduct quarterly training and online technical assistance for benefits planners
 - b) Office Specialist will provide support to the Utah Benefits Planning Assistance and Outreach (UBPAO) TA specialist and Work Ability program in reception, scheduling, training preparation, and general office support
- 2) Establish ongoing feedback from BPAO consumers on quality of services and outcomes
 - a) Support BPAO manager in sending out monthly consumer surveys to assess 1) satisfaction with services and 2) employment status, for those served in the previous month
- 3) Explore the feasibility of developing a fee for service in USOR and other referring agencies, by analyzing the value of providing Benefits Planning services.
 - a) Provide support to BPAO manager to conduct a cost analysis of the UBPAO program
 - b) Inform VR counselors and other referral agencies about the true value of a benefits plan
 - (i) Develop an hourly rate for BPAO
 - (ii) Send cost statement to VR counselor with a completed benefits analysis
 - c) Explore with referring agencies a fee for service option in areas where UBPAO program is not meeting the demand

Objective 3: Establish local employment networks to share information about the labor market and jobs on the “supply side” among individuals with disabilities and

support agencies, including vocational rehabilitation, DWS, high schools, post-secondary institutions and community rehabilitation programs.

- 1) Develop Local Employment Networks to better connect people with disabilities with jobs in the current labor market
 - a) Start in regions that have emerging business leadership networks (e.g., Utah Business Employer Team – UBET)
 - b) Pilot in the Salt Lake Area to correspond to UBET
 - c) Invite representatives from various service agencies to plan monthly events and share information about employment opportunities
 - i) Service agencies encourage individuals to apply for employment opportunities identified through the network
- 2) Improve electronic job search tools available on the Utah DWS website.
 - a) Conduct focus groups with consumers and providers to assess the ease of use and applicability of the tools for people with disabilities
 - b) Provide input from the focus groups to the Online Services Workgroup responsible for updating DWS job seeker tools (UWORKS, Careers.utah.gov, SkillWindow, UtahCares)
- 3) Consider employment outcomes for VR clients earlier in the VR process through implementation of Work Readiness Centers.
 - a) Obtain commitment from a VR District Director to pilot a Work Readiness Center
 - i) Provide a computer with Internet access, which is available for career exploration and job search activities in VR offices
 - ii) Personalized training in the use of internet resources to obtain employment with access following training
 - b) Develop procedures for use of the Center with district office personnel and consumers; address issues such as available time and place, training for Work Readiness Center staff, computer security, etc.
 - c) Market the Work Readiness Center and assist consumers, school aged youth and counselors to use it
 - d) Evaluate the pilot, make changes to procedures and expand Work Readiness Centers to other VR offices
- 4) Host a Job Fair twice a year.
 - a) Invite employers and job seekers and provide accommodations as appropriate
 - b) Provide employability workshops for job seekers and disability orientation for employers during job fair

- c) Evaluate outcomes of Job Fair by following up with employers who attended

Objective 4: Increase employment and job opportunities for youth and young adults with disabilities in transition from school to work through enhanced connections to employers and jobs in the Utah labor market.

- 1) Encourage mentoring and internship opportunities for students with disabilities
 - a) Work with high schools, VR counselors, post-secondary programs to identify interested individuals and prepare them for a mentoring partnership with employers throughout the year
 - i) Build upon experience from Disability Mentoring Day in 2004 and 2005
 - ii) Pilot in 5 schools, 3 VR offices and 2 adult education programs
 - b) Identify employers who are willing to provide mentoring and internship opportunities through employer to employer contact
 - c) Support UBET activities to facilitate fruitful connections between the employers (“demand side”) and Employment Networks (“supply side”)
- 2) Investigate feasibility of a Leadership Academy for students with disabilities
 - a) Work with State Office of Education Transition team to identify a model that has worked in other states
 - b) Assist USOE to develop a RFP with state discretionary funding to seed leadership activities in local schools that will develop a model for Utah

Objective 5: Increase employment and job opportunities through expanding the public awareness campaign “Work Ability: Opening Doors to Work”

- 1) Continue the Work Ability public awareness campaign from 2006-2008
 - a) Utilize in-house supports in Utah Department of Health (PRIMO training) for opportunities for media exposure
 - b) Raise funds from collaborating agencies from year-end carryover funds to purchase media time for Work Ability radio spots;
 - c) Use additional carryover funds from Work Ability grant to purchase media time.
- 2) Solicit feedback and obtain increased buy in among stakeholders
 - a) Distribute this strategic plan to all stakeholders

- b) Gather feedback to improve implementation of Strategic Plan.
- 3) Brand all activities with Work Ability message
 - a) Job Fairs
 - b) Partner in Mentoring Day
 - c) Ongoing training and outreach
 - d) Special projects such as SSDI '1 for 2' Pilot
- 4) Distribute Work Ability CD
 - a) to all current and new members of the Chamber of Commerce
 - b) to new VR and Choose to Work counselors
 - c) to all individuals, organizations or businesses making inquiries
- 5) Maintain currency of Work Ability website

Objective 6: Increase employment through collaboration with and support for other Utah initiatives for employment.

- 1) Utah's SSDI Benefit Offset Pilot Demonstration
- 2) Children's Special Health Care Needs Integrated Services Project
- 3) Utah Association for Persons in Supported Employment
- 4) Utah Choose to Work Self Employment Project (CTWSEP)
- 5) United We Ride, Utah Department of Transportation
- 6) Utah's Real Choice Project

Project Evaluation

Evaluation activities will be targeted on two levels: individual outcomes and system outcomes. Because the goal of Work Ability is to increase employment of individuals with disabilities through systems change, data will measure the number of individuals served by the target programs who obtain and retain competitive employment, as well as measuring the systems change results.

The resources of all partners will be utilized to collect data on the various project activities to track employment and systems outcomes. The following tables summarize evaluation procedures. Table 2 lists the individual level outcomes and Table 3 the system level outcomes.

Table 2: Work Ability Evaluation – Individual Level Outcomes

Outcome Statement - Individual Level	Data source	Who’s responsible for measuring	frequency
Increase employment . . . through sustaining and improving the Medicaid Work Incentive program.	Medicaid Data warehouse	Medicaid Data Staff will generate quarterly counts of MWI participants	quarterly
Increase employment . . . through sustaining and improving the Employment Personal Assistance Services (EPAS) program.	EPAS database	EPAS Coordinator will generate count of EPAS enrollment and number who are currently working	quarterly
Sustain and improve the Benefits Planning Assistance and Outreach (BPAO) program to enable individuals receiving SSA disability benefits to make informed choices about working.	BPAO database	BPAO Office technician will generate count of BPAO recipients who were served during the quarter; indicate numbers who obtained employment, increased their work or retained employment after receiving BPAO services	quarterly
Increase employment for individuals through coordinating a labor “supply side” network of vocational rehabilitation and community rehabilitation programs.	Workforce Development specialist will keep record	Workforce Development Specialist will keep record of individuals who obtained employment through job fairs	3 months following activity
Increase employment and job opportunities for youth and young adults with disabilities in transition from school to work through enhanced connections to employers and jobs in the Utah labor market.	Mentoring Day and School-Employer partnership tracking	GCEPD will track individuals who become employed through Mentoring Day and School-Employer Pilot project	3 months following activity

Table 4: Work Ability Evaluation – System Level Outcomes

Outcome Statement – System Level	Data source	Who’s responsible for measuring	frequency
Employers are participating in business leadership activities	UBET survey and focus groups	UBET staff and Work Ability Project Director	Annually
VR counselors and clients are considering employment earlier in the VR process	1)USOR data on job placement 2) USOR counselor survey	Workforce Development Specialist will track use of VR Workforce Hubs and resulting employment placements; 2) survey VR counselors and Hub users	1) Quarterly; 2) upon conclusion of pilot
DWS workforce tools are more user friendly and accessible to job seekers with disabilities	Consumer & provider survey	Workforce Development Specialist will survey consumers and providers following training in use of the job seeker e-tools	Upon conclusion of training
High schools use more real work settings to connect students with disabilities to work	Data from Mentoring pilot	Work Ability Transition Specialist	Upon conclusion of pilot
MWI, EPAS and BPAO programs are continuing and improving	1) UDOH admin data 2) EPAS database 3) BPAO database	1) Medicaid Data Staff, 2) EPAS Coordinator, 3) BPAO administrator	Quarterly
Increase employment and job opportunities through expanding the public awareness campaign -- “Work Ability: Opening Doors to Work”	1) Number of calls to Work Ability hotline; 2) number of CD’s requested	Work Ability Project Director	annually

Sustaining Employment Efforts

Despite the many improvements made through the efforts of Work Ability, state agencies, providers, consumers and employers, there remain many challenges to employment of individuals with disabilities.

The key challenge will be to sustain these new support services and continue to evaluate and improve the quality and reach of these programs. An important objective of the Work Ability grant as well as the state agencies and providers is to expand capacity and ensure continuous quality improvement of benefits planning services, personal assistance and health care coverage for people with disabilities who work.

Individuals with disabilities are not aware of the many supports and incentives for seeking or increasing employment. Employers generally are not aware of the benefits of hiring individuals with disabilities, e.g., lower employee turnover, low- or no-cost work accommodations, and tax incentives. Employers benefit from a business-to-business exchange of information as well as the expertise from agencies in federal laws such as the Americans with Disabilities Act.

The activities which have occurred under the auspices of Work Ability have proven to be quite effective. As both needs and successes have been identified within the strategic planning process, agencies, businesses and individuals have moved ahead to create an environment which is not only supportive of successful activities, programs and strategies, but challenges the status quo and looks for new and inventive ways to ensure employment opportunities for individuals with disabilities.

The Work Ability project as a Comprehensive Employment System Infrastructure Grant will end in December 2008. At a minimum, key improvement efforts will continue.

These include:

- The Medicaid Work Incentive program and the Employment Personal Assistance Services are both in the Utah Medicaid State Plan.
- Benefits Planning Analysis and Outreach will continue as three agencies have permanent positions for Benefits Specialists within their organizations. Additional Specialists are being requested from the Legislature during the 2006 session.
- By incorporating the initiative of Work Ability under the Coordinating Council for People with Disabilities and adding the Department of Workforce Services to the CCPD discussions, employment for people with disabilities receives broader agency support and leadership in the state. Employment is now, and will remain, an area for the CCPD to address.
- Agencies are collaborating. Joint leadership in committees such as the MOUSE (Memorandum of Understanding to Support Employment) exemplifies the benefit of agencies such as the Utah State Office of Rehabilitation and the Department of Workforce Services joining efforts to support and pursue employment for people with disabilities.
- The Chamber of Commerce has demonstrated commitment to promoting employment for individuals with disabilities through the formation and maintenance of the UBET Committee (Utah's Business Leadership Network). The UBET committee has moved beyond its early formation to become a strong

force within the business community with broad representation from various sectors of the employment market.

- The Governor's Committee for Employment of People with Disabilities remains focused on supporting UBET and promoting employment for individuals with disabilities.
- The relationship between the Social Security Administration in Utah and state agencies is dynamic and responsive. An atmosphere of collaboration and information sharing exists among the representatives of federal and state agencies.
- Employers want to hire individuals with disabilities. Employers are more knowledgeable about resources and supports in the workplace, are willing to partner with agencies and schools to provide meaningful experiences and actively recruit individuals with disabilities as employees. Hiring individuals with disabilities is becoming the expected practice rather than the exception.
- Individuals with disabilities are more educated and want to pursue employment, when they had previously feared losing their benefits. The numbers of self-referrals for BPAO and EPAS are growing beyond what can be expected from typical outreach.
- Several other initiatives exist in the state. Some extend past December 2008 and will continue the efforts to promote and sustain employment for individuals with disabilities. These include: Utah's SSDI Benefit Offset Pilot Demonstration, The Children's Special Health Care Needs Integrated Services Project, the Utah

Choose to Work Self Employment Project (CTWSEP), United We Ride, and Utah's Real Choice Project.

Utah's statewide efforts to increase employment for individuals with disabilities, is an effort beyond that of a single project or agency. Individuals with disabilities, employers, agencies, and providers share a common vision of successful employment for Utahns with disabilities so they may enjoy a quality of life of their own choosing.

Table 4: Work Ability Budget

Jan 1, 2006 - Dec 31, 2006

Comprehensive Infrastructure Grant #11-P-92406-8/02
Work Ability Budget - 2006 (Rev.1/26/06)

ORG
5104

	Step	FTE	Salaries	Benefits	Total Annual Comp 2006	2006
Personnel – DOH						
Carol Ruddell (HPMngr)	69	1.00	64,661	21,813	86,475	86,475
Elizabeth Cerna, Secretary	30	0.50	11,232	8,192	19,424	19,424
Buckley, Mandee, HPSpecII	44	1.00	32,807	20,356	53,163	53,163
Transition new position	43	1.00	31,938	15,225	47,163	47,163
Lancaster, Nonie (.25) Out. Spec	31	0.25	5,685	3,733	9,417	9,417
LynAnn Williams (.03) estimate	34	0.03	793	347	1,140	1,140
Total DOH salaries			147,116			
Total DOH employee benefits				69,666		
Total DOH compensation					216,782	216,782
Total Compensation						216,782
Travel						
In-State						4,000
Out of State						7,000
Total Travel						11,000
Equipment						
new computers, printer						6,200
Total Equipment						6,200
Supplies						
office supplies						6,200
Total Supplies						6,200
Contractual						
USOR subcontract						151,221
EPAS assessment contracts						3,375
UofU subcontract						16,912
USU subcontract						34,588
U Mass Boston/ICI						16,250
NCHSD						5,000
Walsh and Weathers						3,750
Total Contracts						231,097
Other						
Phone/Hotline						5,000
Work Ability Campaign						5,064
Workgroup Expenses						5,000
Total Other						15,064
Total Direct Charges						
Indirect						13,657
Indirect rate 6.3% of total DOH compensation						13,657
Total Project						500,000

Budget Narrative – Work Ability project
January 1, 2006– December 31, 2006

Personnel

The Utah Department of Health is requesting salaries for the following staff:

Carol Ruddell will be the Work Ability project director (1.0 FTE) at an annual salary of \$64,661.30;

Mandee Buckley will be the program specialist for health policy (1.0 FTE) at a salary of \$32,806.83;

Nonie Lancaster will be the outreach specialist (.25 FTE) at a salary of \$5,684.00;

Elizabeth Cerna will be the Project Assistant (.50 FTE) at an annual salary of \$11,232.45;

Lynann Williams will provide technical support for contracts (.03 FTE) at an annual cost of \$793.00;

A new individual will be the Transition Specialist (1.0 FTE) at a salary of 31,938.

Total Personnel: \$147,116

Fringe Benefits

Fringe benefits include health and dental insurance, retirement through the Utah State retirement system, FICA, unemployment compensation, worker's compensation, vacation and sick leave. Fringe benefits are provided to all employees who work 20 hours per week or more. The cost of health benefits is based on the employee's family status of employee only, employee plus one dependent, or 2 or more dependents. Retirement is 14% of salary. Ruddell fringe = \$21,813.36; Buckley fringe = \$20,355.83; Lancaster fringe = \$3,732.68; Cerna fringe = \$ 8,192; Lynann fringe = \$347.00 and Transition Specialist fringe = \$15,225.

Total fringe benefits: \$69,666

Total salaries plus fringe benefits = \$211,623

Travel

In state travel is requested for the project director to travel to meetings, for the outreach and transition specialist to conduct outreach to individuals with disabilities and training statewide, and for the program specialist to attend meetings and meet with individual clients and providers. All three will require occasional overnight travel if meetings are in rural southern or eastern Utah. State mileage rate is \$.31 per mile for private car if a state car is not available.

In state travel requested is \$4,000.

Out of state travel is requested for the project director to attend 2 meetings per year for national technical assistance partnership and CMS meetings. Air fare to Washington DC/Baltimore is \$800 roundtrip, hotel for 3 nights is \$750, per diem is \$50 per day X 3 days= \$150; ground transportation, tips and incidentals = \$100. Total out of state travel for 2 trips is \$3,600. Travel is also requested for program specialist and outreach

specialist to travel to one national conference each to exchange promising practices in the area of disability and employment. 2 trips X \$1700 each = \$3,400
Total out of state travel requested is \$7,000.

Total travel: \$9,000

Equipment

A computer workstation (laptop with docking station) and office software is requested for the new position of transition specialist, and a laptop to conduct program outreach and training - \$6,200.

Total Equipment: \$6,200

Supplies

Office supplies for the project include paper, pens, copy and printer toner cartridges, disks and other office consumables. \$6,200

Total Supplies: \$6,200

Contractual

1. Utah State Office of Rehabilitation –

(a) To employ a full-time benefits planning technical assistance specialist – to provide training and technical assistance to benefits planning staff who work for agencies outside USOR. \$49,700 includes salary and benefits.

(b) To provide administrative support for Governor’s Committee on Employment of People with Disabilities for organizing UBET with the Chamber of Commerce and lead businesses and implementing Mentoring Day. Funds will support temporary or part time clerical staff to arrange meetings, take minutes of meetings and disseminate Mentoring Day information and arrange mentorships. \$33,404

(c) To employ a workforce development specialist to engage the ‘supply side’ providers in active pursuit of employment for consumers with disabilities. This specialist will develop a system to provide assistance and training to providers to link job seekers with employers through a variety of activities such as job fairs, mentoring experiences, etc. \$50,580 includes salary and benefits.

(d) Office supplies and equipment to support staff – \$1,500

(e) Travel, both in state and out of state – \$2,500

(f) Information technology (IT) support for local and wide area network access, computer repair and troubleshooting for five Work Ability staff = \$3,900.

(g) Allocated operation and maintenance expense for five employees in a state-owned office building - \$9,638

Total USOR contract - \$151,221

2. EPAS Evaluation

Evaluation of assessment instruments for EPAS eligibility. Three providers complete assessment with applicants. The Medicaid Long Term Care Bureau is evaluating the appropriateness of the MDS-HC assessment tool for use in the EPAS program. Total - \$3,375.

Contractual - Technical Assistance Budget

3. University of Utah's Center for Public Policy and Public Administration

(a) Consultant to facilitate the Work Ability strategic planning process, evaluate monthly BPAO data collection, assist in evaluation of all initiatives. Sara McCormick, MPA - \$16,912

Total U of U-CPPA contract - \$16,912

4. Utah State University Center for Persons with Disabilities

(a) To conduct evaluation of work incentive programs: Jeff Sheen, M.S.W. and Dr. George Julnes, and website support, travel, phone and printing/supplies -\$32,188

Total USU-CPD contract - \$34,588

5. One or more national State to State Technical Assistance partnership contracts

Specific technical assistance needs for Utah include:

- (a) Individual consultations, e.g., in-person, telephone or email to address issues such as workforce development, data sharing issues, etc.;
- (b) Information gathering for response to information needs;
- (c) Presentations at meetings or conferences;
- (d) Planning and organizing national MIG technical assistance meetings;
- (e) Organizing topical workgroups via conference calls;
- (f) Access to a comprehensive TA website and monthly electronic newsletters;
- (g) A governance council for the TA network.

- U Mass Boston/Institute for Community Inclusion - \$16,250
- Health & Disability Advocates / NCHSD - \$5,000
- Walsh and Weathers Research and Policy Studies - \$3,750

Total state to state TA contracts per year - \$25,000

Total Contractual -- \$228,696

Other Expenses

To cover expenses for a toll-free Work Ability information phone line. Monthly phone charges and long distance toll charges. \$417 per month X 12 = \$5,000

The Work Ability Public Awareness Campaign will continue. This amount will fund a media buy as well as updating the Work Ability CD. - \$5,064

Reimburse work group volunteer expenses. Consumer members of the Work Ability Coalition will be reimbursed for expenses of attending meetings. - \$5,000

Total other expenses: \$10,000

Indirect costs:

Approved indirect cost rate is 6.3% of total salaries and benefits

Total salaries and fringe benefits = \$13,332

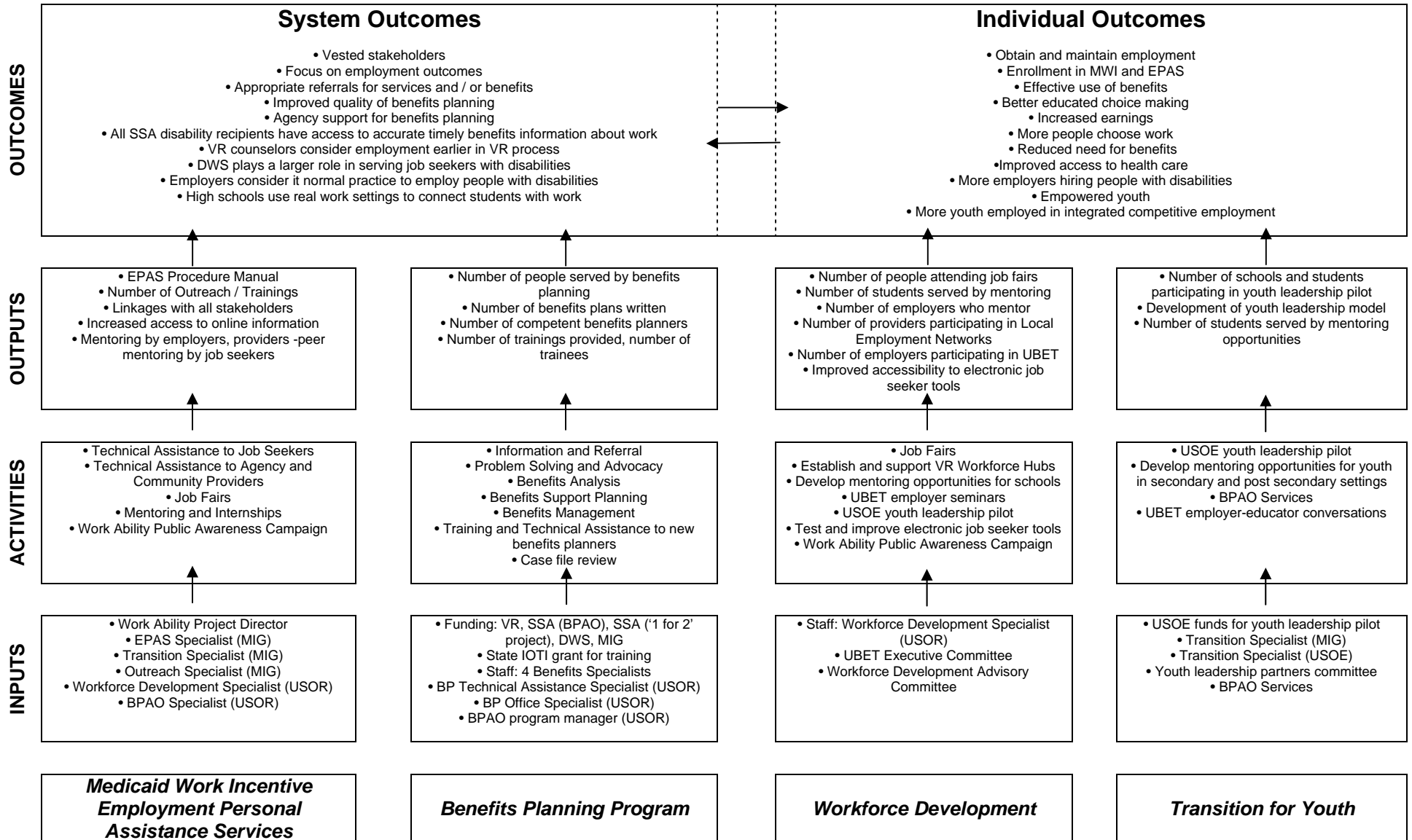
Total indirect: \$13,332

Total requested for Work Ability Project: \$500,000

Appendix A

Logic Model

Work Ability Logic Model



Appendix B
Organization Chart

Work Ability Utah Executive Board

