

A BLUEPRINT FOR CHANGE

STRATEGIC PLAN 2006-2008 OREGON COMPETITIVE EMPLOYMENT PROJECT for PERSONS WITH DISABILITIES

**Oregon Department of Human Services
Office of Vocational Rehabilitation Services**

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I. INTRODUCTION

Over the past several months, the *Oregon Competitive Employment Project* has worked to develop this strategic plan, *A Blueprint for Change*. This document describes how, over the next three years, the Project and its partners and supporters will build a more comprehensive, inclusive and integrated system of employment-related services and supports for Oregonians with disabilities.

Oregon has a history as a pioneer and innovator in providing services and supports to its citizens with disabilities, including the area of employment. The state's system of employment services and supports, while well developed, responsive and interconnected in some areas, is incomplete, inadequate and disjointed in others. As a whole, the system has impediments and disincentives. It is fragmented and can be confusing. These are the concerns and issues that the Project seeks to address.

The *mission* of the Oregon Competitive Employment Project is *to enhance the quality of life in Oregon by achieving, maintaining and advancing the competitive and inclusive employment of persons with disabilities*. The Project's corresponding *goals* are to:

- Empower people with all types of disabilities to obtain meaningful employment.
- Educate and engage employers to develop and market the “business case” for employing people with disabilities.
- Enhance the availability and effectiveness of employment supports for persons with disabilities.
- Enhance Oregon's workforce system and expand its availability for persons with disabilities.

The Blueprint outlines how the Project intends to carry out this mission and reach these goals. Over the following pages, the Blueprint identifies and describes:

- The action values and principles that guided development of the Blueprint, and will serve as touchstones for future Project decisions.
- The events and developments pertinent to the Project and the current environment.
- The issues, challenges and problems that will be addressed by the Project.
- The strategies and activities the Project will carry out, and the objectives and outcomes it seeks to achieve.

Our vision is ambitious but balanced. In the course of developing the Blueprint, the Leadership Council and Project staff developed and adopted the following *Action Values and Guiding Principles*. We intend that these be part of the Project's processes, strategies and activities, outcomes, and evaluation of the Project's success.

We value:

- Informed choice and self-determination.
- Person-centered planning and decision-making.
- Equal opportunity, full participation, and contribution to community.

- Empowerment and community inclusion.
- Diversity and cultural competency in process, communication, policy and program development.
- Self-sufficiency and economic independence.
- Access to appropriate training and education to achieve career and employment goals.
- Education, training and technical assistance.
- Collaborative decision-making.
- Evidenced based practices and measurable outcomes.
- Work that is beneficial and enhances the quality of life.
- Advocacy and inclusion of people with disabilities in policy and service design.

Guiding Principles:

- Our values will be represented in the development of a workforce system that provides for full inclusion of people with disabilities.
- Employment is an economic and social goal that benefits individuals, the community, the state and the economy.
- Public policy should reduce employment barriers experienced by people with disabilities, providing the supports and services they need to obtain and maintain competitive community employment.
- The needs of business will be better met through active collaboration with and among employers to develop creative solutions.
- Universal access to health care and transportation enhances the ability to work for all people.
- Partnerships and collaboration are key to successful and sustainable employment outcomes.
- Systemic barriers exist disproportionately for those with disabilities and the Competitive Employment Project will prioritize actions that minimize or eliminate those barriers.
- Providing workplace adaptations for different human needs is a fundamental skill needed by all employers.

Values and principles are important but they can be abstract. In order to clarify what the Project seeks to achieve, we have developed several hypothetical vignettes of how the Project intends Oregon's employment system to assist and support persons with disabilities. After the system refinements and changes outlined in the Blueprint have been implemented, we hope that these vignettes become realities. The vignettes can be found in the Appendix.

Our vision is tempered with an understanding of what is achievable. The difficulties that people with disabilities have experienced in obtaining and maintaining competitive employment is the result of years of misunderstanding, misinformation, neglect, and discrimination. Many of the challenges and difficulties that we seek to remedy will not be resolved overnight, or during the

life of the Project. But we can and we will make Oregon's competitive employment system more integrated, inclusive, collaborative, and culturally competent for Oregonians with disabilities.



The Blueprint is the result of a remarkable effort, including numerous community forums, key informant interviews, workgroup sessions, and meetings of our Leadership Council, as well as hundreds of hours of intensive and focused work by the Project's staff, contractors and consultants. It represents the perspectives and best thinking of many persons with disabilities, family members, employers, the business community, advocates and leaders of state and local government and nonprofit organizations.

The Project's Strategic Planning Design Team and Leadership Council intend that the Blueprint be a dynamic and evolving document. The world is not a static place. If the Project is to be a success, we will need to update and modify the Blueprint and make adjustments to our strategies and activities as circumstances change, and as we learn more about how to best support persons with disabilities and employers in developing a more integrated and inclusive workforce.



We are eager to implement the Blueprint – to sustain, strengthen, remodel and improve those systems and elements, and build those bridges and other structures needed to make competitive employment a reality for all Oregonians with disabilities. Please join us in this effort.

II. BACKGROUND

This section “scans” statistics, current information, and background information pertinent to the employment of people with disabilities and implementation of the Project, including revised and updated information from the “Environmental Analysis” section of the Department of Human Services’ Medicaid Infrastructure Grant (MIG) proposal.

This section of the Blueprint, and information collected through other elements of the Project’s strategic planning process and reported in subsequent sections, constitutes our environmental scan.

A. RECENT DEVELOPMENTS

In the mid-1980s, as Oregon was struggling to come out of an economic recession, civic and political leaders came together to create Oregon Shines, a vision for a world-class workforce and a thriving economy. Within two years, Oregon Shines led to the development of the Oregon Benchmarks, the first-ever attempt by a state to develop objective indicators for measuring the quality of life of a state in the areas of economy, health, natural resource sustainability and civic participation. Over one hundred measurable indicators – including a number specific to persons with disabilities – were developed by opinion leaders around the state. These measures were subsequently endorsed by the Oregon Legislature as a framework for public policy that would endure over time.

In 1996, policy leaders in Oregon, operating in partnership with consumers and advocates, implemented the Oregon Employment Initiative (OEI), with a focus on removing barriers to employment for persons with disabilities. Under OEI, key administrators in the Department of Human Services were charged with addressing policy, programmatic and service delivery issues through better coordination of existing systems as well as developing new ways of providing employment-related services to people with disabilities.

Over the ensuing years, Oregon has made other efforts to comprehensively serve persons with disabilities, notwithstanding Oregon’s economic difficulties. The state developed and increased its coordinated case management approaches to service delivery and continued to use its Medicaid Home and Community-Based Waiver for eligible persons with developmental disabilities to support employment. In 1999, Oregon launched the Employed Persons with Disabilities (EPD) program, one of the first Medicaid Buy-In programs in the country. Under the EPD program, eligible Oregonians with disabilities can work without losing their Medicaid health care benefits.

While the Oregon Employment Initiative was worthwhile, its timing was unfortunate, as another economic recession hit the state in late 2000. Between December 2000 and June 2003 the number of unemployed Oregonians increased by more than one-third. Oregon suffered from the highest unemployment in the nation. Thousands of Oregonians with disabilities were stuck in this economic downturn.

In 2001, the state began implementing the *Staley* settlement, entitling adults with developmental disabilities to self-determined community-based support services. While development of these new services continues, thousands of people previously on waiting lists for services are receiving a limited amount of funding to pursue life goals, including employment.

As the recession continued and its severity increased, policy-makers faced with a shortfall in state revenues implemented a series of significant budget cuts to many programs, including several of those serving Oregonians with disabilities, the poor and elderly. Oregon's Medically Needy program was eliminated, affecting more than 8,000 people who do not qualify for Medicaid; delays in the *Staley* settlement implementation schedule were instituted; funding was eliminated for thousands of Oregonians receiving long-term care services; over 10,000 non-Medicaid clients stopped receiving community mental health services and the Sheltered Services program, which provided non-competitive employment to nearly 200 Oregonians with severe disabilities, was eliminated. Many other human service programs were eliminated or reduced, and training budgets were reduced.

The recession officially ended in 2003 and today the Oregon economy is growing at a healthy rate. Nevertheless, the state continues to recover from the effects of severe unemployment and public service cuts. From April 2001 to October 2004, the state had the first or second highest unemployment rate in the nation, climbing to a high of 8.7 percent in June 2003. This fall, the rate slipped below 6 percent (seasonally adjusted) in October and presently is 5.7 percent. While encouraging, Oregon still has the 8th highest rate of unemployment rate in the nation; the national rate has declined to 4.9 percent. On a related basis, Oregon has continued to experience a decline in high-tech and high-paying jobs. Job growth has primarily occurred in the service sector and the construction trades, as the real estate market in urban Oregon has seen unprecedented price increases.

Some of the reductions made to health and human service programs by the Legislature in 2001 and 2003 were moderated later. But state revenue collections fell short of that needed to sustain human service programs, including those for people with disabilities. As a result, the 73rd Biennial Legislature, which began to meet in January 2005, was unable to reach agreement about a budget for the 2005-2007 biennium until August. This was the Legislature's second longest session in the state's history. In the end, more reductions were made, and more are possible. Unanticipated caseload growth has created shortfall in the current Department of Human Services budget. Hopefully, the state's economy will continue to expand and with it state revenue collections.

B. DISABILITY-RELATED STATISTICS AND DEMOGRAPHICS

1. Numbers of Persons with Disabilities

Presently available data about disabilities indicates that about 20 percent of Americans have a disability. Data on the prevalence of disability in Oregon indicates 550,000 Oregonians have a

disability, and that among people between the working ages of 16 and 64 an estimated 17.8 to 20 percent have a disability. As of 2004, Oregon's total population was estimated to be 3.5 million.*

2. Number and Types of Disabilities

In a recent survey of Oregonians, those persons between the ages of 16 and 64 reporting that they have a disability, reported having one or more disabilities as follows:

- 74,652 or 11.2 percent – Sensory disability
- 171,131 or 25.7 percent – Physical disability
- 113,742 or 17.1 percent – Mental disability
- 43,595 or 6.6 percent – Self-care disability
- 83,756 or 12.6 percent – Go-outside home disability
- 178,032 or 26.8 percent – Employment disability

3. Disabilities and Ethnicity

Nationally, disability rates vary considerably by ethnicity:

- 24.4 percent of African-Americans and Native Americans have a disability
- 20.9 percent of Latino Americans
- 18.3 percent of European American
- 16.6 percent of Asian Americans

Oregon-specific data indicates that persons with disabilities in Oregon are more likely to be older and of White, Non-Hispanic ethnicity. This is consistent with Oregon's overall ethnic composition:

- 87.4 percent are White
- 9.6 percent are Hispanic
- 3.5 percent are Asian
- 1.7 percent African-American
- 1.0 percent Native American or Alaskan Native
- 3.2 percent Other

4. Disabilities and Employment

Disability is strongly and negatively correlated with employment status in Oregon. About 43 percent of people with disabilities report not being employed compared with 25.5 percent of people without disabilities. Information collected by the Employment Department indicates that 234,000 Oregon workers between the ages of 16 and 64, or about 60 percent of workers with disabilities, reported their impairment created hardships for them at work.

* This and other data presented here is the best presently available comprehensive data. But it has its limitations. The methods used to collect, categorize and report information vary by source and each set of data only provides a "snapshot" of a given moment. The Project is continuing to search for more useful and informative data. In addition, the Project will work with others to refine data collection efforts in order to obtain a more complete, valid and reliable picture of disability-related developments in Oregon.

5. Where Persons with Disabilities Live

In reviewing data on where Oregonians with disabilities live, it is evident that most persons with disabilities (along with most other Oregonians) reside in the western valleys of the state, or the Interstate 5 corridor, with additional concentrations of persons residing along the Interstate 84 corridor. Nevertheless, the range in the percentage of persons with disabilities in urban and rural areas is considerable and not predictable. In fact, the areas in Oregon with the highest percentage of persons with disabilities are not the same as the areas with the highest population densities.

6. Other Significant Factors

In looking at other employment-related factors, when comparing Oregonians with disabilities to Oregonians without disabilities, persons with disabilities:

- Were much less likely to be employed and tended to have lower incomes.
- Were less likely to have wage or self-employment income, and more likely to have assistance income.
- Were nearly twice as likely to be at or below the poverty level.
- Were more likely to rent, and less likely to own, their homes.

C. SYSTEM STRENGTHS

Oregon's system of employment services and supports has a number of significant strengths and assets. These strengths (as identified in the Department of Human Services' proposal submitted for our Medicaid Infrastructure Grant), include:

- A well-developed and community-based set of long-term care options. Through 25 years of work in developing and implementing Home and Community-Based Waivers, Oregon has developed a multi-level system that includes enhanced capacity and service for persons with physical and developmental disabilities, allowing persons with severe disabilities to be able to consider employment with their basic needs being met in a setting of their choice.
- Strong partnerships within and across state human service and advocacy programs.
- Provision of a variety of forums through which persons with disabilities and advocates have been able to make their interests and concerns known, and participate in the development and implementation of key programs, including the EPD program (Oregon's Medicaid Buy-In Program).
- The basic Medicaid and employment infrastructure that has been developed over the past several years, which includes benefits planning, mentoring and outreach services for people with disabilities, and the partnerships that exist among the systems.

D. SYSTEM CHALLENGES

The Medicaid Infrastructure Grant proposal also identified a number of challenges, including:

- Current systems are unable to provide adequate, affordable, and appropriate supports for persons with all types of disabilities who want to work.

- There is a lack of support for the development of home-based businesses and micro-enterprises.
- There is inadequate access to bilingual services for persons with disabilities who do not use English as a primary language.
- Current systems are not placing adequate focus on diversity training and cultural competency within state government and local systems, to ensure better service.
- Employer engagement is low in many areas and generally inconsistent.
- A lack of comprehensive planning at the local level often leaves programs operating independently and misses opportunities for collaboration and services integration.
- Transportation and housing, and other support services are not available or readily accessible for people in many parts of Oregon.
- Many consumers who could benefit from services are not aware of these services due to lack of outreach and information.
- The amount of resources available for existing programs is insufficient to serve all who could benefit from services.

III. DEVELOPMENT OF THE PLAN

A. PRE-PLANNING DEVELOPMENTS

Early in 2005, the Office of Vocational Rehabilitation Services (OVRs), the entity within the Department of Human Services (DHS) responsible for administering the Medicaid Infrastructure Grant and Project, decided that the Project's strategic plan would not be developed until Oregon's biennial legislature adopted a budget. This would provide a clearer picture of the state's troubled economy, and inform state administrators of what their budgets would be for the coming two years. With this information, people and programs would be in a better position to make commitments, and a more realistic plan could be developed.

In the interim, OVRs moved forward on other fronts. On April 11, the Project was formally launched with a meeting of 25 representatives of consumer, employer and disability-related programs and organizations. A number of these representatives or their organizations had been involved in developing and submitting the proposal for the Medicaid infrastructure grant. The group examined barriers to competitive employment of persons with disabilities, and identified possible members for a "high-level leadership council," the advisory body that would be responsible for providing the Project with guidance and support over the course of its existence.

During this same period, OVRs began recruiting for the Project's four staff positions (a Project Manager, Policy Analyst, Research Analyst and Administrative Specialist). In May, the Research Analyst and Administrative Specialist positions were filled, but recruitment for the Project Manager continued. In addition, the decision was made to postpone filling the Policy Analyst position until staffing needs were better understood.

The Legislature struggled to reach agreement about a budget. It finally did so just before adjourning on August 5.

B. DEVELOPMENT OF THE STRATEGIC PLAN

1. Planning to Plan

The development of the strategic plan began in July 2005 with the hiring of the Project Manager. Although the manager could not assume his responsibilities on a regular basis until September, a Strategic Planning Design Team was assembled, and the planning team and manager began to meet on a weekly basis. The Strategic Planning Design Team included:

- The Policy and Program Manager of OVRs (who also had been designated Project Director).
- The Coordinator of Adult Mental Health Services for the Oregon Office of Mental Health & Addiction Services.
- A Developmental Disabilities Employment Specialist from the Seniors and People with Disabilities (SPD) cluster.
- The Coordinator of SPD's Employed Persons with Disabilities program (Oregon's Medicaid Buy-In Program).

2. Planning Process

Within a month, the Strategic Planning Design Team and Project Manager developed a process for producing the strategic plan. That process consisted of the following elements:

- Identifying and assessing:
 - Employment issues, challenges and gaps that need to be addressed in order to make competitive employment a reality for persons with disabilities in Oregon.
 - Strategic opportunities that might be exploited or built on in order to address employment concerns and problems.

- Gathering and analyzing additional information obtained through:
 - Structured interviews of acknowledged leaders and experts on disability and employment-related services and supports.
 - Production of “concept papers” or “issue briefs” on key issues related to the employment of persons with disabilities in Oregon.
 - Community forums that would be held throughout the state in order to hear from persons with disabilities, employers and governmental officials at regional and local levels.

- Assembling and utilizing a Leadership Council, initially responsible for providing the Project and its staff with input, guidance and recommendations about the strategic plan, and subsequently advising and assisting the Project in implementing the plan over the ensuing three years.

3. Planning Process Timelines

As part of the planning process, the Strategic Planning Design Team identified a set of timelines for carrying out planning tasks and completing the plan:

August 22-October 14

- Interview key individuals
- Assess “strategic” opportunities and challenges

September 21

- Convene Leadership Council – review contemplated process for developing Strategic Plan and initiate planning effort with Council

September 27-October 13

- Hold Community Forums throughout the state

October 19

- Hold Leadership Council meeting – continue planning work

October 24-November 10

- Hold follow-up discussions with key decision makers, community leaders and regional and national contacts
- Develop draft Strategic Plan

November 16

- Hold Leadership Council meeting – review and collect recommendations and input about draft Plan

November 14-29

- Disseminate draft Plan for review and comment
- Refine draft Strategic Plan and develop “logic models”

November 30

- Submit draft Strategic Plan and logic models to the Centers for Medicare and Medicaid Services (CMS)

December 14

- Hold Leadership Council meeting – follow-up on any concerns made by CMS and make any other needed revisions
- Revise and finalize Plan and develop work plan and budget

December 31

- Submit final Plan, work plan and plan budget to CMS

4. Leadership Council

In late August 2005, OVRS selected and appointed the Project’s Leadership Council. The council’s members are broadly representative of the groups and constituencies required of grantees, and comports with the membership proposed by DHS in its MIG grant proposal. Initially the council was comprised of 22 members, but it has since been increased to the following 25 individuals (see Figure 1 below). It is anticipated that additional appointments will be made to the Leadership Council in order to strengthen representation of persons with disabilities, employers and governmental agencies, and enhance the knowledge and expertise necessary to carry out its responsibilities.

Since it began meeting in September, the Leadership Council, with the assistance of the Project Manager, staff, and facilitators, has worked to:

- Review and approve the planning process.
- Identify employment opportunities and challenges.
- Articulate the Project’s purpose, mission, and objectives.
- Develop a recommended set of action values and guiding principles.
- Review, analyze and prioritize information gathered through the planning process (see below).
- Review successive drafts of planning documents in order to make recommendations about substantive issues, strategic and process considerations, and priorities.

In addition to the work done at Leadership Council meetings, council members have worked on elements of the plan between meetings; and a number of council members have participated in other parts of the planning process, including as key informants and by attending community forums. The Leadership Council has brought a remarkable level of enthusiasm, energy, insight and knowledge to the Project.

COMPETITIVE EMPLOYMENT PROJECT LEADERSHIP COUNCIL -- FIGURE 1	
Lucy Baker Oregon Business Leadership Network	Clover Mow Worksystems, Inc.
Tracy Callaghan Social Security Administration	Cynthia Owens Oregon Council on Developmental Disabilities
Lita Colligan Governor's Workforce Policy Advisor	Steve Paysinger Brain Injury Treatment Center, Salem Rehabilitation
Representative Gary Hansen Oregon House of Representatives	Janice Richards Oregon Parent Training & Information Center
Craig Keyston Employment Department	David Romprey Oregon Consumers/Survivors Coalition
April Lackey Department of Community College Services & Workforce Development	Tamara Sale Mid-Valley Behavioral Care Network
Scott Lay People with Disabilities Advisory Committee	John Shilts Workers' Compensation Division
Raleigh Lewis Office of Minority, Women & Emerging Small Businesses	Frank Synoground Commission for the Blind
Francisco Lopez Integrated Services Network	Stephaine Parrish Taylor Office of Vocational Rehabilitation Services
Martin Loring Oregon Department of Transportation	Tina Treasure State Independent Living Council
Bill Lynch Oregon Council on Developmental Disabilities	Mike Volpe People with Disabilities Advisory Committee
Mike Maley Seniors and People with Disabilities	Doug Zeh Oregon Advocacy Center
Mike Moore Office of Mental Health and Addiction Services	

5. Information Gathering and Analysis

The specific elements and results of the Project's strategic planning processes are summarized below. Taken as whole, this information provides:

- A scan of Oregon's disability and employment-related systems and environment, including identification of:
 - System strengths and infrastructure elements that need to be preserved and sustained.
 - Gaps, barriers and problems that limit persons with disabilities in Oregon from gaining and maintaining real and meaningful employment.
 - Opportunities for making or amplifying needed changes.

- Ideas and recommendations for addressing gaps, barriers and problems, and building on opportunities for change.

6. Key Informant Interviews

Utilizing a standardized format (see Appendix), 22 leaders and experts on disability and employment-related services and supports were interviewed or surveyed as key informants, including:

- Administrators or Deputy Administrators of the:
 - Oregon Commission for the Blind
 - Office of Mental Health & Addiction Services
 - Office of Minority, Women and Emerging Small Businesses
 - Seniors and Persons with Disabilities cluster
 - Office of Home and Community Services
 - Office of Federal Resources and Financial Eligibility
 - Office of Vocational Rehabilitation Services
 - Workers' Compensation Division
- Directors of the:
 - Oregon Advocacy Center
 - Oregon Council on Developmental Disabilities
 - Oregon Parent Information and Training Center
 - Oregon Independent Living Council
 - Oregon Technical Assistance Corporation
- Key staffers with the:
 - Oregon Employment Department
 - Oregon Department of Transportation
 - Social Security Administration

Key informants were asked a number of questions, including:

From your perspective, what do we need/want to sustain, build or convert here in Oregon in order to help persons with disabilities that are working to keep working, and make it possible for those who are not working to obtain real and meaningful work?

- a. What needs to be sustained?
- b. What needs to be built or developed? (This may also include leveraging of resources.)
- c. What needs to be modified or converted?

Informant responses to this and other questions were organized into broad categories – “issue areas” or “domains” – and are summarized below:

Employee Supports & Work Incentives

- Review and explore arrangements for expanding the availability of benefits planning.

- Expand the availability of supported employment and related supports and services to persons with psychiatric disabilities, and persons with traumatic brain injuries.
- Expand the availability of peer mentoring and advocacy, and incorporate person-centered methodologies.
- Refine the Employed Persons with Disabilities Program (Oregon’s Medicaid buy-in program).
- Address cultural diversity and competency.
- Ensure that the workforce is fully accessible and responsive to persons with disabilities.
- Foster partnerships and collaborations across the human service and employment continuum within the state and regionally.
- Address economic inequities and disparities in various human service programs that serve as disincentives to work.

Employer Supports & Work Incentives

- Develop and implement an educational and marketing campaign addressing employer reservations about hiring persons with disabilities, including fears, concerns and needs.
- Identify and/or develop information and resources needed by employers in order to hire and retain persons with disabilities, including:
 - “Best practice” accommodations (from both the employer and employee perspectives), assistive technology, and financial and tax incentives
 - A dedicated source of assistance for employers to assist them in making reasonable accommodations and addressing other issues related to employing persons with disabilities

Transportation

- Expand the availability and accessibility of transportation (needed by persons with disabilities in order to obtain and maintain employment)

Youth & Family Supports

- Increase the availability of transition through:
 - Training of families, volunteers or case managers
 - Contracting out transition functions (rather than continuing to rely on schools)
 - Changing the attitudes of teachers and schools (that persons with disabilities are unemployable)

Housing

- Expand availability of affordable housing

7. Community Forums

A series of nine community forums were held between October 3 and 21. The meetings were organized by five of Oregon’s Centers for Independent Living and Project staff. Forums took place in Bend, Eugene, Gresham, Medford, Newport, Ontario, Pendleton, Portland and Salem.

Attendance at most of the meetings was 20 to 30 individuals. Persons with disabilities, self-advocates and family members participated in nearly all of the forums. There also was a strong presence of provider and state agency staff, primarily those who provide services to people with

physical and psychiatric disabilities. Personal agents from the brokerages supporting persons with developmental disabilities, and advocates and provider agencies who represent or serve persons with developmental disabilities also attended meetings. In addition, Centers for Independent Living staff attended and participated in most of the forums.

At each forum, participants were informed about the Competitive Employment Project. In turn, participants were asked a series of questions about what is being done or needs to be done in order to make competitive employment a reality for persons with disabilities in relation to the following employment-related “issue areas” or “domains” – Employee Supports and Work Incentives, Employer Supports and Incentives, Transportation, Housing, and Youth and Family Supports. The questions focused on what services and supports need to be sustained; what services and supports need to be refined, modified or changed; what services or supports are absent or missing; and what the Project might want to consider in terms of priorities and opportunities. All of the concepts and proposals that emerged from the forums were recorded on flip charts and in meeting notes. Through the resulting input, the following planning and investment opportunities emerged:

- **Best Practice Research and Data Collection**

Forum participants identified areas of interest and proposed that best practice research be done to explore these areas. Community education and marketing strategies, Medicaid waiver changes, rural transportation models, culturally specific employment programs, employment services for individuals with psychiatric disabilities and development of peer mentor programs were among the recurrent themes that emerged. Some of the data collection proposals were related to the best practices research and others were supportive of community education and marketing efforts.

- **Pilot and Demonstration Projects**

The need to establish local best practices and seed future systems change through the development of pilot projects was identified as a priority in all issue areas. Specific pilot priorities included development of services for people with psychiatric disabilities, improved transportation services in rural areas, development of micro-enterprise/self-employment models, and culturally competent services delivery and outreach models.

- **Training and Technical Assistance Priorities**

Training priorities included strong recommendations for cross disabilities systems training, improved benefits planning training, peer mentor training, and self-advocacy training. Technical assistance priorities included recommendations for local grant writing assistance, support for cross disabilities systems planning efforts, support for development of community education marketing materials and strategies and development of strategies to increase the number of employers providing employment opportunities to people with disabilities.

- **Resource Mapping and Development of Resource Guides**

The need for employment resource mapping and development of functional resource guides at the local level was identified as a critical need in all of the content areas. Providing support to track systems changes and keep resource guides current was viewed

as essential. Consolidation of fragmented, and at times contradictory, resources was also identified as a priority. Participants also suggested developing an assistive technology resource guide.

- **Improved Administrative Processes**

Participants identified a number of areas in which administrative rules, regulations, eligibility and paperwork requirements were barriers to services or program development. It was not always clear if the barriers resulted from regulatory requirements, at either the state or federal level, or from state or program level administrative rule or policy. Participants recommended that these areas be evaluated, a determination made where changes can be made, and that changes be initiated.

- **Statute Change, Waiver Revisions and Policy Initiatives**

Participants at all forums identified the need for major changes in eligibility and benefits criteria, Medicaid Waiver revisions, housing regulations and transportation rules. Forum participants requested that these recommendations be evaluated and a determination made as to the viability of pursuing these recommendations through the Competitive Employment Project.

- **Cross Disabilities Systems Integration and Collaboration Planning**

All forums indicated an understanding of and support for ongoing integration and cross disabilities system planning efforts. There was specific interest in increased collaboration among systems involved and increased responsibility for “transition” services and supports.

8. Concept Papers and Issue Briefs

Early in the planning process, the Project made arrangements with a number of experts and knowledgeable individuals to develop “concept papers” on key issues related to employment of persons with disabilities. The papers were reviewed and utilized by the Leadership Council and Project staff in developing the Blueprint. The topics covered by the concept papers are identified below (where a paper’s title differs, the title is identified in parenthesis):

- Supported Employment of Persons with Developmental Disabilities
- Transportation (“Transportation Coordination”)
- Youth and Family Supports (“Youth Transition”)
- Employer Supports to the Employment of Persons with Disabilities
- The Business Case for Employers to Hire and Retain Persons with Disabilities (“Business Case for Inclusion of People with Disabilities in the Competitive Workplace and Consumer Base”)
- The Business Case for Persons with Disabilities to Seek and Maintain Employment (“Business Case for Employment of Persons with Disabilities”)

In addition to obtaining these concept papers, the Project has sought and, in several instances, been provided with a number of shorter papers or fact sheets – “issue briefs” on the following issues:

- Possible conversion of mental health day treatment programs to mental health supported employment
- Small business considerations
- Proposed SSA Ticket-to-Work rule changes and related opportunities for systems change

As the planning process progressed, it was determined that more comprehensive information was needed on the following issues:

- Benefits planning best practices, models and options
- Utilization of Social Security’s Ticket-to-Work Program
- Supported employment of persons with psychiatric disabilities
- Supported employment of persons with acquired traumatic brain injuries

The concept papers on benefits planning, Ticket-to-Work and supported employment of persons with psychiatric disabilities were completed recently; the paper on supported employment of persons with acquired traumatic brain injuries will be completed later. A number of the recommendations from these additional papers have been incorporated in the Blueprint but other issues and recommendations will be addressed when Project workgroups meet to refine the related Blueprint *issue areas* and the corresponding strategies and activities (see Section V below).

In addition to providing needed planning information, the concept papers will serve as touchstones for the Project as the Blueprint gets implemented, and strategies and activities are reviewed and evaluated.

Copies of the concept papers and issue briefs can be found in the Appendix.

9. Resource Mapping

In order to more fully understand Oregon’s system of employment services and supports and identify related gaps and barriers, the Project is mapping these resources. The results of this work will be utilized in further evaluating systemic strengths and weaknesses and in evaluating the Project’s progress. The Project will carry out additional resource mapping as needed to address specific objectives.

10. Development of Priorities and Completion of the Strategic Plan

Through successive meetings and a variety of processes, the Leadership Council, Project staff and consultants have worked to refine the Blueprint and develop both a comprehensive and focused approach to the various issues that need to be addressed in order to make competitive employment a reality for Oregonians with disabilities. On one hand, Medicaid infrastructure grantees, including Oregon, are being asked to develop comprehensive plans; on the other, states have limited resources with which to implement plans.

Through the initial phases of the planning process, the Project catalogued, synthesized and analyzed the employment concerns and issues raised and identified through Key Informant interviews, the Community Forums, the Concept Papers and Issue Briefs, and Leadership Council meetings. In addition, the Project staff and that of other state disability programs sought to incorporate their knowledge and understanding of matters. In turn, all of this information was presented to and reviewed and refined by the Leadership Council.

Over four subsequent Leadership Council meetings, members were been asked to identify and prioritize those strategies and activities that they would like the Project to carry out over the next three years. The Council considered issues in small, cross-disability and cross-function groups, and as a whole. The Council was asked to prioritize these issues utilizing a number of criteria and factors, including:

- The Project's mission and goals
- The Project's action values and principles
- The extent to which contemplated strategies and activities:
 - Are doable?
 - Are the best strategy for the issue or issues involved?
 - Can be done within existing resources or through the leveraging of other resources?
 - Can or should be addressed through education, training or technical assistance, or the development of recommended changes to policy/rules/legislation?

At the end of November, a draft version of the Blueprint was submitted to the Centers for Medicare and Medicaid (CMS). Project staff reviewed the draft with a CMS evaluation team in mid-December. The CMS evaluation team provided the Project (and other state Medicaid Infrastructure Grantees) with a list of recommended changes in late December and extended the deadline for submission of final strategic plans until February 15. Project staff subsequently made a number of changes and additions to the Blueprint.

IV. IMPLEMENTATION OF THE PLAN

This section of the Blueprint addresses processes and tasks related to implementation of this plan.

A. PROJECT LEADERSHIP AND MANAGEMENT

The responsibility for leading, managing and implementing the Project will be carried out by and through the following entities, groups and processes:

- **The Community**

While it is impractical for all of the individuals, communities, groups, organizations and agencies that have an interest in the Project to play a direct role in leading it, the concerns and perspectives voiced by many individuals and groups through the Project's planning process had a considerable effect on the content of the Blueprint. The Project values this input and recognizes the importance of the community *owning* of the plan. Without such direction and buy-in, the Project is unlikely to succeed.

The Project will continue to look to "the community" for leadership and direction. This will be done by convening additional Community Forums; maintaining a broad-based and representative Leadership Council; appointing knowledgeable non-Council members to Council and Project committees and work groups; and, keeping stakeholders informed about the Project's activities and outcomes through the continuing publication of the Project's newsletter, direct outreach to stakeholder groups, and Project participation in the stakeholder meetings and activities.

- **Leadership Council**

The Council advised and assisted the Project in developing the Blueprint. With the completion of the plan, the Leadership Council, will be asked to advise and assist the Project in implementing, promoting and evaluating the Project and refining the Blueprint through additional planning and strategizing.

The role of the Leadership Council should not be understated. The Council is the formal mechanism through which the varied communities, groups and interests at the center of the Project's mission are represented and reflected. Council members are expected to bring with them:

- The views and concerns of those they represent.
- Their knowledge and expertise.
- A respect and appreciation for persons with disabilities and employers, and for labor and work.
- A commitment to the Project's mission and activities and to support the Project with and through their organization, group or community.
- A willingness to:
 - Work collaboratively with other organizations, groups and individuals.
 - Take-on difficult issues.

- Think creatively and develop new and different solutions.
 - Educate policy makers on needed changes and legislation.
- **Project Director and Staff**
The Project Director has overall responsibility for leading the Project. This includes implementing the Blueprint and managing its day-to-day operations. In addition, the Director coordinates and supports the Leadership Council, represents the Project publicly, and interacts with the other agencies and programs, organizations and groups involved with or affected by the Project. The Director reports to the Administrator of the Office of Vocational Rehabilitation Services (OVRs).

The Project's staff – which consists of a policy analyst, a research analyst and an administrative specialist – are responsible for providing the analytical, research, substantive, and support functions needed to carry-out the Project's strategies and activities. Staff will continue to support Leadership Council and work with the Project's partners in implementing various elements of the Blueprint, as outlined in the Project's Work Plan.

- **Office of Vocational Rehabilitation Services**
OVRs is the entity within the Department of Human Services (DHS) responsible for administering the Medicaid Infrastructure Grant. OVRs is responsible for overseeing and housing the Project. OVRs, as the state's vocational rehabilitation system, is also a partner and primary stakeholder in the Project.

OVRs' Administrator is a member of the Project's Leadership Council. In addition, the Administrator represents the Project and its interests in a variety of forums, including at the departmental level.

- **Department of Human Services**
The Project's partners within DHS include Seniors and Persons with Disabilities Services cluster and the Office of Mental Health and Addiction Services.

- **Other Partners and Supporters**
In addition to its DHS partners, the following agencies are partners or supporters of the Project and are represented on Leadership Council: the Employment Department, the Department of Community Colleges and Workforce Services, the Department of Transportation, and the Workers' Compensation Division.

A number of other government and nongovernmental agencies and organizations and stakeholder groups are affiliated with the Project as partners or supporters, including those listed below. Many are represented on the Project's Leadership Council; others are participating in the Project in other capacities. Some of these agencies, organizations and groups will work with or assist the Project in implementing specific strategies or activities, as identified in the Project's work plan.

B. SUSTAINING CHANGE

Over the long-term, the Project's success will be measured by the degree to which its strategies are implemented, its outcomes realized, and real, meaningful and lasting change is achieved. In order to facilitate its success, the Project has identified a number of intermediate and long-term strategies for sustaining competitive and inclusive employment of persons with disabilities. These strategies include:

- **Maintaining a strong, representative and engaged Leadership Council.**
The Council's members understand that as the Council moves from being a planning to implementation body, they will become responsible for supporting, promoting and facilitating the Project's goals, objectives and outcomes. Council members, as leaders and stakeholders, will play a pivotal role in promoting the Project's objectives, outcomes and goals. In order to ensure that all of the Project's constituencies are represented, Leadership Council membership will be increased and diversified in order to include those groups not presently represented or under-represented.
- **Utilizing work groups and committees to refine or develop and implement strategies for addressing specific issues and problems.**
Time-limited and ongoing work groups and committees will be established and utilized in order to carry out additional planning, coordination or oversight of specific activities implementation, and address other substantive and process issues. Where it is possible and practical, work groups will function as committees of the Leadership Council and will include Leadership Council members, non-Council members (who can bring additional insight, expertise or institutional support to the task-at-hand), and Project staff. Work group and committee recommendations and input will be forwarded to the Project Director and the Leadership Council for review, refinement and implementation.
- **Solidifying change through development and implementation of policy, rules and practices, and statutory change.**
Development and implementation of new policy, rules and practices is part of a number of the Project's strategies (see Section V below). In promoting and implementing new policies and practices, the Project may utilize the Leadership Council or individual Council members to promote or facilitate change.

In the event statutory or budgetary changes are needed in order for the Project to achieve one or more of its objectives, the Project will consider taking these matters to the Oregon Legislature. In this event, a legislative and budget package will be developed in 2007 and 2008 for submission to the 2009 Biennial Legislature. (Oregon's Legislature meets every other year. Custom dictates that state agencies prepare and submit contemplated legislative and budgetary proposals to the Governor's office at least one year in advance of the next legislative session).

In the event the Project does not exist in 2009, the Project will make the necessary arrangements with the Department of Human Services and the Office of Vocational Rehabilitation Services to carry its recommended legislative and budgetary proposals to

the legislature. Any and all Project legislative and budgetary proposals will be subject to prior review and approval by the Governor's office, DHS and OVRs.

- **Communicating information about the Project's activities, successes and challenges.** The Project will promote and build on its successes by sharing the results of its activities and outcomes, and heighten awareness of and sensitivity to the challenges and difficulties people with disabilities face in obtaining and maintaining competitive employment, by implementing the communications plan described below.

C. COMMUNICATIONS PLAN

At the onset of its strategic planning process, the Project initiated a plan for communicating with stakeholders and other concerned parties in order to make them aware of the Project, the planning process and Project activities, and invite their input and participation in developing the Blueprint. To date, the Project's communications efforts have entailed publication of a periodic newsletter; outreach to key stakeholders and groups in order to introduce and generate interest in the Project and provide updates about our progress; and solicitation of input and information needed to develop the Blueprint, through interviews of Key Informants and convening of Community Forums.

While the content of the Project's communication efforts will change as we shift from planning to implementation mode, we will utilize many of the same processes and forums. The Project will continue to:

- Produce and distribute its periodic newsletter in order to update people about the Project developments and upcoming activities. The Project will also explore the feasibility of establishing a web site dedicated to the Project and its activities.
- Directly gather information through additional interviews of Key Informants and additional Community Forums. This information will be utilized to complete planning activities still in progress, and carry out additional planning.
- Directly engage, inform and update its partners, stakeholders and other concerned parties by making formal and informal presentations, and by attending and participating in the functions and activities of other groups.

The Project will also implement targeted and specific communication activities as part of one or more of its strategies, including the employer educational and marketing campaigns described below (see Section V.A.).

Finally, the Project will work with the DHS Public Affairs staff and the Project's partners in the workforce system to communicate through other vehicles, including news releases, the newsletters and publications of other groups, and the DHS Director's weekly message.

D. INCREASED COLLABORATION

The Project recognizes the value and importance of collaboration and building consensus in initiating and sustaining systems change, and in developing and operating comprehensive,

coordinated and effective systems of services and supports. The Project will continue to work collaboratively and in coordination with its partners in order to foster and support strong working relationships at all levels of the Project, by continuing rely on its diverse and representative Leadership Council for direction and guidance; by assembling and utilizing cross-systems work groups to further develop and operationalize Project strategies and activities; and, by promoting the delivery of comprehensive and integrated client-directed and centered services and supports to individuals with disabilities. Increased collaboration between consumers, employers, service providers and governmental agencies increases the likelihood that available resources will be fully and effectively utilized, and that individuals will not be denied services due to a lack of awareness or understanding about their availability. Increased collaboration should also improve the sustainability of Project-instituted or promoted changes because the groups and individuals responsible for initiating change will have been involved in identifying and developing refined and new practices, policies, programs and systems.

E. LEVERAGING OF ADDITIONAL RESOURCES

Where and when possible, the Project will increase the resources available to carry out its activities. To this end, the Project has leveraged and will continue to seek to leverage funding, staff resources, in-kind and programmatic support, and other forms of assistance from its partners and supporters.

F. PERSON-CENTERED PLANNING

A strong and recurring theme at Community Forums and Leadership Council meetings was that person-centered planning is being underutilized in planning and supporting the employment of persons with disabilities. People also maintained that there is sufficient expertise within the state's developmental disabilities service system to provide person-centered training and expertise to other parts of the disability services and support continuum.

Person-centered planning is an established and recognized process for developing integrated and comprehensive consumer-directed services and supports. Initially used to prepare and predict successful services and supports for persons moving from institutional care settings to community living, person-centered planning is now used in a multitude of disability service settings, including supported employment planning and implementation.

Person-centered planning involves three primary and interrelated activities:

- Working with an individual and his or her families, friends and professional supporters to identify the individual's goals and aspirations.
- Identifying the paid and unpaid services and supports the individual needs and may access in order to pursue his or her goals and aspirations.
- Developing a comprehensive plan for obtaining and utilizing the needed natural and paid resources and assistance.

Person-centered planning has been utilized in Oregon for a number of years. Its use is an important element in the *Staley* settlement agreement. Under *Staley*, all adults with

developmental disabilities, who are living in their own home or a family home as an alternative to an institutional setting, are to be provided with person-centered planning, an individual budget, and the help of a *personal agent*. (The personal agent is responsible for assisting the adult in developing and implementing the person-centered plan). In addition, person-centered planning has been made a part of the all state Medicaid Waivers for developmentally disabled, physically disabled, or aged citizens living in community settings as an alternative to a nursing home or intermediate care facility for persons with mental retardation.

In recent years, the Seniors and Persons with Disabilities Services cluster and the Office of Vocational Rehabilitation Services have promoted the joint use of person-centered policies and practices for common customers. This is a significant change from traditional paper and pencil assessment processes and person-centered planning has not yet become the accepted practice for many counselors, educators, and case managers.

The Project's focus on person-centered planning is intended to promote consumer choice and self-determination as a means to achieve positive and enduring employment outcomes. This will be achieved by supporting and promoting the use of person-centered planning, and developing and refining those tools and resources needed for effective person-centered planning.

G. OUTCOME TRACKING SYSTEM AND INDICATORS

As outlined in Oregon's Medicaid Infrastructure Grant proposal, the Project's outcome tracking system and outcome indicators will be based on systems and indicators presently utilized or under development by the State of Oregon. The project is currently assessing two options for tracking the results of activities. It will either utilize the *Performance Reporting Information System* (PRISM) maintained by the Oregon Employment Department, or it will compile and maintain a database of information submitted by key partners, including the Office of Vocational Rehabilitation Services, the Office of Mental Health and Addiction Services, the Seniors and Persons with Disabilities Services cluster, and the Employment Department.

The Project had planned to use the U.S. Department of Labor's *ETA Management Information and Longitudinal Evaluation* (EMILE) system for outcome tracking. But shortly after we submitted the Project's draft strategic plan, we were informed that implementation of EMILE has been postponed indefinitely. Consequently, EMILE will not be used. Instead, the Project's outcome tracking system will be aligned with the U.S. Department of Labor "common measures" in order to ensure continuity and sustainability in the event EMILE is implemented in the future.

a. The common measures that will be utilized as outcome indicators for Project issue areas and objectives related to adults are:

- The date an individual begins employment.
- The duration of an individual's employment or employment retention.
- An individual's earnings increase over a designated period of time (tentatively set at 6 months).

b. The common measures that will be utilized for outcomes related to youth (in relation to transition and youth) include:

- Placement in employment or education upon leaving high school
- Attainment of a degree or certificate
- Retention of employment or education one year after high school

In addition, the Project will utilize a number of additional identifiers because the common measures are not adequate or appropriate measures of all the anticipated activities. The additional indicators will include some or all of the following:

- Employment rate
- Average earnings
- Hours worked
- Job satisfaction
- Premiums and expenditures of the Employed Persons with Disabilities Program
- SSI and SSDI status
- Benefits
- Self-declared health indicators
- Hospitalization

These indicators will be collected from:

- The Office of Medical Assistance Program's data system
- The Employed People with Disabilities premium collection tracking system
- Oregon's Medicaid Management Information System
- The Seniors and Persons with Disabilities Services cluster's Developmentally Disabled Employment Outcomes System
- The Employment Department's unemployment insurance system
- Individual surveys of program participants

Enrollees in the Employed Persons with Disabilities Program (Oregon's Medicaid Buy-In Program) will continue to be the primary cohort. In addition, there will be a specific focus on groups underserved in the area of competitive employment, including those with serious and persistent mental illness, persons with acquired traumatic brain injuries, and persons with significant or severe developmental disabilities, as well as persons with disabilities who are ethnic or cultural minorities.

H. LOGIC MODELS

The required *logic models* have been developed and are included in the Appendix. Logic models are brief, linear depictions of the resources, activities, and outcomes of the Project; and are a required element of this plan.

I. FUTURE PLANNING

The Project's planning activities will not end with formal completion of this document and submission of it to the Centers for Medicare and Medicaid Services. We will continue to plan throughout the course of the Project in order to:

- Complete the planning needed for specific strategies and activities.
- Adjust and revise the Project's strategies and activities – as we learn what works and what does not, and respond to new, changing and unforeseen circumstances and developments.
- Sustain changes made or prompted by the Project.

In addition, should the Project have or obtain additional funding or other resources, the Project will revisit issues and concerns that were identified in the course of developing the Blueprint but which the Project is not addressing because of funding and staffing limitations.

Continuing and future planning will be carried out the Project's staff, the Leadership Council and the Project's issue specific work groups. This dynamic process will involve planning, implementing, reviewing, engaging in further planning in order to make additionally needed or necessary refinements and adjustments, implementing further, and so on, until a strategy or activity is completed, or is implemented to the extent possible. As noted above, sustainability planning will be a part of the Project's continuing planning processes.

Finally, it should be noted that although the Blueprint is comprehensive, it is by no means complete. It is neither feasible nor practical for the Project to address many of the challenges and barriers that persons with disabilities face in obtaining and maintaining competitive and inclusive employment, given Project's limited resources, and the complexity and the scope of the underlying issues and problems.

Data Sources and Informants

- 2000 United States Census Data
- 2004 American Community Survey Data
- “2004 Disability Status Reports Oregon,” Cornell University
- “Amendments to the Ticket-to-Work and Self-Sufficiency Program,” Federal Register, September 30, 2005, Volume 70, Number 189.
- “Benefits Planning in Oregon: A Vision for the Future,” concept paper prepared by the Oregon Advocacy Center, December 2005
- “Business Case for Employment of Persons with Disabilities,” draft concept paper Tina Treasure, Oregon Independent Living Council, and Scott Lay, Advocate and Employment Consultant
- “Supported Employment for People with Psychiatric Disabilities for Oregon Medicaid Infrastructure Grant (MIG)/Oregon Competitive Employment Project,” concept paper prepared by Joe Marrone, Institute for Community Inclusion, University of Massachusetts Boston.
- Data about underserved populations in Oregon, Oregon Advocacy Center
- “Defining Evidence-Based Supported Employment,” Crystal R. Blyer
- Issue brief on Benefits Planning, Molly Holsapple, Seniors and People with Disabilities cluster
- Issue brief on Ticket-to-Work in Oregon, Molly Holsapple, Seniors and Persons with Disabilities cluster
- Issue briefs on possible modifications to EPD Program and development and use of Individual Development Accounts, prepared and submitted to the Project for consideration by Scott Lay, Advocate and Employment Consultant
- “Northwest Job Gap Study: Searching for work that pays,” Northwest Policy Center 1999
- “Oregon Business Leadership Conference: Business Case for Inclusion of People with Disabilities in the Competitive Workplace and Consumer Base,” Lucy Baker, Oregon Business Leadership Network
- “Oregon Medicaid Infrastructure Grant Evaluation Report,” Oregon Health Policy Institute
- “Oregon MIG White Paper on Employer Supports to the Employment of People with Disabilities,” concept paper prepared by Lucy Baker, Oregon Business Leadership Network and Sharon Baggett
- Preliminary information on benefits planning options, Oregon Advocacy Center
- “Strategic Planning Concept Paper: Youth Transition,” Janice S. Richards, Executive Director, The Oregon Parent Training and Information Center
- “Supported Employment for Persons with Developmental Disabilities,” prepared by the Oregon Council on Developmental Disabilities and Janet Steveley, Workable Solutions.
- Ticket-to-Work [Program] in Oregon, concept paper, prepared by the Oregon Advocacy Center, December 2005
- “Transportation Coordination”, concept paper prepared by Martin Loring and Sherrin Coleman, Department of Transportation

- Community Forums – local community members, service providers, advocates, and persons with disabilities were given an open forum to discuss strengths, weaknesses and opportunities surrounding supports for employment of persons with disabilities.
 - Portland
 - Salem
 - Gresham
 - Medford
 - Eugene
 - Newport
 - Bend
 - Pendleton
 - Ontario
- Consultants and Technical Assistance
 - Jennifer Webster, Business Strategies, Inc.
 - Scott Pelham, Chief Operations Officer, Oregon Technical Assistance Corporation
 - Howard Klink, Klink Consulting
 - Center for Workers with Disabilities
 - National Consortium for Health Systems Development
- Key informants and survey respondents:
 - Bob Joondeph, Oregon Advocacy Center
 - Craig Keyston, Oregon State Employment Department
 - Bill Lynch, Oregon Council on Developmental Disabilities
 - Bob Nikkel, (with Margaret Thiele and Mike Moore), Office of Mental Health and Addictions
 - Cathy Cooper, Seniors and People with Disabilities
 - Janice Richards, Oregon Parent Training and Information Center
 - Martin Loring, Oregon Department of Transportation
 - Stephaine Parrish Taylor, Office of Vocational Rehabilitation
 - Tina Treasure, State Independent Living Council
 - Mike Maley, Seniors and People with Disabilities
 - Frank Synoground, Oregon Commission for the Blind
 - John Shilts, Workers' Compensation Division, Department of Consumer and Business Services
 - Lynnae Ruttledge, Office of Vocational Rehabilitation Services
 - Scott Lay, People with Disabilities Advisory Council
 - Scott Pelham, Oregon Technical Assistance Corporation
 - Tim Kral, Oregon Rehabilitation Association
 - Cynthia Owens, Oregon Council on Developmental Disabilities
 - Terry Mastin, Office of Mental Health and Addictions
 - Tracy Callaghan, Social Security Administration
 - Brenda Sheppard, Employed Persons with Disabilities
 - Raleigh Lewis, Oregon Office of Women, Minorities, and Emerging Small Business
 - Francisco Lopez, Support Services Brokerage

V. PRIORITY ISSUE AREAS, OBJECTIVES AND STRATEGIES

This section identifies and describes each of the employment-related *issue areas* that the Project will address. The information provided is organized as outlined below. Note that corresponding elements of the Logic Models are listed in parenthesis.

- **Issue Area** – this heading identifies the issue area and sub-issue area (if applicable).
- **Goals** (Overall System Outcomes) – this heading restates the Project’s four overall goals and, by use of checkmarks, indicates which goal or goals the Project will seek to fulfill through its efforts on the stated issue area.
- **Outcome Indicators** (System and Individual Outcomes) – this heading contains the outcome indicators or performance measure that the Project intends to track or measure its progress in achieving the stated goal or goals.
- **Objectives** – this heading describes the Project’s objective in addressing the stated issue area.
- **Issue Summary** – this heading contains information pertinent to the stated issue area, including an explanation of the area or background or other contextual information.
- **Data Sources** – this heading identifies the primary sources of information the Project utilized to identify, analyze and prioritize the stated issue area and objective.
- **Strategies and Activities** (Outputs and Activities) – this heading outlines the strategies that the Project will utilize and the activities it anticipates carrying out in addressing the stated issue area and objective.

ISSUE AREA A

Employee Supports & Work Incentives – Supported Employment

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
Educate and engage employers to develop and market the “business case” for employing people with disabilities
- √ Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- Increase the number of persons employed and the duration of employment each year with supported employment
- Increase wages and documented job satisfaction for persons in supported employment
- Increase the number of individuals and organizations trained by the MIG project
- Increase the number of community agencies within supported employment capacity

OBJECTIVE

Expand supported employment for persons with disabilities, with an emphasis on groups historically underserved, including persons with severe psychiatric disabilities, acquired traumatic brain injuries, and severe developmental disabilities.

ISSUE SUMMARY

The concept and practice of what constitutes supported employment has changed over time. Today it is generally accepted that supported employment involves competitive work in an integrated work setting for persons with severe disabilities for whom competitive employment has not traditionally occurred; and for persons who, because of their disability, need intensive ongoing support services to be successful in the workplace. Services and supports may include job development or assistance in getting a job, intensive job training, transportation and mobility assistance, adaptive aids and devices, job modification, employer and co-worker training and technical assistance, and personal assistance services.

In reviewing the need for employment and supported employment of persons with disabilities, in general it was noted that there is a need for:

- Increased community capacity of job developers, coaches, and other job development resources.
- Increased use of available resources for limited and longer-term employment services and supports.

- Removal of policy and procedural barriers and disincentives that limit employment opportunities.
- Greater awareness and appreciation of the “business case” for work.

While persons with different types of disabilities have common needs and experience similar problems in seeking and obtaining work, the status of and needs for supported employment services and supports can and does vary by disability group.

- **Persons with Psychiatric Disabilities**

Throughout the Project’s planning process strong and broad support was voiced for expanding the availability of supported employment services and supports for persons with severe and persistent psychiatric disabilities. Knowledgeable mental health professionals, persons with psychiatric disabilities and others asserted that many persons with severe and persistent psychiatric disabilities desire competitive employment, and that evidence-based supported employment is the most effective way to help them achieve this objective.

Evidence-based mental health supported employment emphasizes competitive jobs that are based on a person’s preferences for type and amount of work, integrated work settings, job-seeking when an unemployed person expresses interest, minimal pre-vocational preparation and assessment, and follow-along supports from mental health and vocational specialists to maintain the job or transition to another one.

Oregon Medicaid data indicates that 10,288 persons with serious and persistent mental illness were in services in 2004. Employment Department data about these same individuals suggests that only 1,842 or 18 percent were employed in some capacity during the same year. This figure is comparable to the estimated 15 percent nationwide employment rate for persons with serious and persistent mental illness.

Oregon’s county-operated mental health system provides limited supported employment programs and very limited employment-related supports and services to persons with significant psychiatric disabilities. Evidence-based model programs exist in five counties and only about 400 to 500 Oregonians with severe and persistent psychiatric disabilities have access to such programs.

- **Persons with Developmental Disabilities**

Many stakeholders, including family members, advocates for persons with developmental disabilities and others, voiced the desire to see Oregon regain the ground it has lost in providing supported employment to persons with developmental disabilities.

Oregon was a national leader in supported employment of persons with developmental disabilities in the period between 1985 and 1995 but this is no longer the case. Day programs and sheltered workshop placements increased in the final years before the closure of Fairview Training Center in 2000. Through Oregon’s recent recession, many individuals who lost supported employment jobs returned to more segregated settings. In addition, the movement to more self-directed services resulted in some individuals

choosing to use their limited funds for purposes other than employment. In the period from 2003 to the present, the Office of Vocational Rehabilitation Services and the Seniors and Persons with Disabilities Services cluster (SPD) have initiated collaborative policy development and staff training to provide supported employment to persons served through SPD's "brokerages."

- **Persons with Acquired Brain Injuries and Persons with other Physical Disabilities**
Strong interest was expressed for making supported employment services, supports and incentives available to persons with acquired brain injuries and persons with other physical disabilities. The applicable home and community-based Medicaid waiver does not presently allow for the use of funds for long-term employment supports for either of these groups.

DATA SOURCES

- "Concept Paper on Supported Employment for People with Psychiatric Disabilities for Oregon Medicaid Infrastructure Grant (MIG)/Oregon Competitive Employment Project," prepared by Joe Marrone, Institute for Community Inclusion, University of Massachusetts Boston.
- Issue brief on "Capacity Building Factors in Converting Adult Day Treatment to Supported Employment," prepared by the Oregon Office of Mental Health & Addiction Services
- Data from Department of Human Services, Employment Department and other state sources
- "Defining Evidence-Based Supported Employment," presentation notes from Crystal R. Blyer, SAMHSA Center for Mental Health Services
- "Supported Employment for Persons with Developmental Disabilities," prepared by the Oregon Council on Developmental Disabilities and Janet Steveley, Workable Solutions.
- Draft concept paper on the "Business Case for Employment of Persons with Disabilities," Tina Treasure, Oregon Independent Living Council, and Scott Lay, Advocate and Employment Consultant
- Key Informant Interviews
- Community Forums
- Leadership Council

IMPLEMENTATION STRATEGIES AND ACTIVITIES

Expand the availability of supported employment services and supports to persons with disabilities, with an emphasis on groups historically underserved, by developing and implementing needed policy, program and funding mechanisms.

1. **Promote development of evidence-based supported employment services and supports to persons with serious and persistent mental illness throughout Oregon by supporting development and delivery of services and supports in up to five counties.** Provide targeted counties with needed support, resources and technical assistance. Initiate efforts in one to two counties in first year; two counties in second year; and, two counties in third year.

- a. Providing grants to counties for needed technical assistance, implementation of systems change and development of needed policy and programming.
 - b. Providing, through the resources of the Office of Vocational Rehabilitation Services (OVRs), a staff position dedicated to assisting and supporting the counties.
2. **Increase the availability of supported employment services and supports to persons with developmental disabilities through expansion of existing supported employment services and supports, and development and implementation of new initiatives.** Final decisions about activities will be made after additional recommendations and information are obtained from the Project's Developmental Disabilities Supported Employment (DDSE) Workgroup and a Project-sponsored "Forum" on strategies and activities used by other states to increase supported employment services and supports during periods of limited revenue. Priority consideration will be given to:
- a. Providing training and development to 12 SPD-OVRs interagency supported employment teams.
 - b. Supporting development and operation of a training academy for job coaches in order to increase the availability of local vocational assistance and resources.
 - c. Providing cross training on supported employment "best practices" and issues to SPD-OVRs partners.
3. **Increase the availability of supported employment of persons with acquired traumatic brain injuries.** This strategy will be refined and the activities for carrying it out will be identified after further research and development. Implementation will follow. Priority consideration will be given to funding one or more replicable demonstration projects or initiatives.

ISSUE AREA B

Employee Supports and Work Incentives – Benefits Planning

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
Educate and engage employers to develop and market the “business case” for employing people with disabilities
Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- Increased number of benefits planners
- Increased availability of benefits information
- Increased utilization of benefits information and employment supports

OBJECTIVE

Develop the benefits planning services and supports necessary for persons with disabilities to obtain and utilize those public benefits and work incentives needed to achieve their desired employment outcomes.

ISSUE SUMMARY

An integrated, comprehensive, effective and accessible system of benefits planning services is needed in order to assist persons with disabilities pursue and achieve their desired employment outcomes by obtaining and utilizing accurate, current and relevant information about public benefits and work incentives.

- Many people with disabilities depend on Medicaid, Medicare, SSI, SSDI and Workers’ benefits to meet essential needs. They live at or close to poverty. Without benefits, they are likely to experience serious and highly undesirable consequences, including homelessness or hospitalization. As a result, persons with disabilities often hesitate to engage in activities, including employment, because they may lose health care or income benefits.
- Public benefit programs are exceptionally complex. Rules and procedures concerning eligibility and the use of benefits are often difficult to understand and subject to continuous revision. These circumstances can and do result in miscommunication between benefit recipients, the staff responsible for administering benefit programs, and the professionals who serve and support persons with disabilities; and the subsequent loss or denial of needed benefits and services. Over time, this has heightened the concerns

that persons with disabilities and their supporters have about taking risks with their benefits.

- In order to make it possible for persons with disabilities to work, public benefit programs, particularly SSI and SSDI, have developed a variety of programs or work incentives to alleviate problems and barriers to work. But incentive programs are also complex and this complexity can add to the confusion and misunderstanding of benefit programs. As a result, fewer people are using work incentives than is possible.

In response to these issues, benefits planning services have evolved during the past two decades. Through benefits planning, persons with disabilities can obtain the information and planning assistance they need to access and best utilize the benefits and work incentives in pursuing, obtaining and maintaining employment and other desired outcomes, while minimizing the loss or diminution of their benefits.

Benefits planning involves a range of services and service providers. At its most basic level, benefits planning may involve informing a potentially eligible individual or the individual's family about the availability of benefits, evaluating the individual's need for more comprehensive benefits planning, and referring the individual to a benefits program and a professional benefits planner. Professional benefits planning involves advising individuals and their supporters about the specific benefit and work incentive options available to the individual and the potential impacts of employment on those benefits. Benefits planners also counsel and support individuals about choices necessary to achieve their goals.

The number of individuals and organizations presently providing benefits planning services in Oregon is not known. But benefits planning professionals and stakeholders agreed that the availability of benefits planning services, including basic information, screening and referral services, and professional benefits planning or counseling services, falls far short of the need for these services. In addition, it was noted that the individuals and organizations that are providing benefits planning are not working in coordination with one another, that they possess varying levels of training and experience, and that they provide varying levels of services.

Benefits planning professionals and stakeholders strongly recommended the Project facilitate development of a more comprehensive, integrated and accessible benefits planning services. It was widely agreed that benefits planning is a necessary and key factor in achieving competitive and inclusive employment of persons with disabilities.

DATA SOURCES:

- "Benefits Planning in Oregon: A Vision for the Future," concept paper prepared by the Oregon Advocacy Center, December 2005
- "Supported Employment for Persons with Developmental Disabilities," concept paper prepared by the Oregon Council on Developmental Disabilities and Janet Steveley, Workable Solutions, November 2005

- Draft concept paper on the “Business Case for Employment of Persons with Disabilities,” Tina Treasure, Oregon Independent Living Council, and Scott Lay, Advocate and Employment Consultant
- Issue brief on Benefits Planning, Molly Holsapple, Seniors and People with Disabilities cluster
- Preliminary information on benefits planning options, Oregon Advocacy Center
- Key Informant Interviews
- Community Forums
- Leadership Council

IMPLEMENTATION STRATEGIES AND ACTIVITIES

1. **Promote development of a comprehensive, effective and sustainable benefits planning system.** The Project will make final decisions about which activities it will implement after completing its analysis of the following issues and questions, and the other information required to specify the benefits planning system needed by Oregonians with disabilities in order to seek, obtain and maintain employment.
 - a. How, when and by whom should basic information about benefits planning be made available to persons with disabilities and their supporters; and how and when should individuals be screened and referred for more intensive benefits assistance, including that of a professional benefits planner.
 - b. How education and training may be provided to individuals and programs responsible for providing persons with disabilities with basic information about benefits, and screening and referring them for more intensive benefits assistance.
 - c. The need for and availability of professional benefit planners; and, how additional professional benefits planning services may be developed and provided, including the pros and cons and feasibility of fee-for-service benefits planners.
 - d. The cost and benefits of the WORKBENEFITS planning tool as a screening, educational or planning tool; and whether the Project should underwrite its completion.

ISSUE AREA C

Employee Supports and Work Incentives -- Employed Persons with Disabilities Program, SSA Ticket-to-Work and PASS Programs, Workers' Compensation Return-to-Work Programs, and Other Work Incentives

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
Educate and engage employers to develop and market the “business case” for employing people with disabilities
- √ Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- Increased availability of funds to cover medical and employment expenses
- Increased number of persons with disabilities working and retaining health care
- Increased number of persons able to pay premiums, co-pays, and other medical expenses
- Increased utilization of the Employed Persons with Disabilities program, SSA’s Ticket-to-Work and PASS programs, and Workers’ Compensation Return-to Work programs
- Increased availability of work incentives

OBJECTIVE

Increase employment of persons with significant or severe disabilities by reducing disincentives to work, and assisting them in obtaining, maintaining and advancing in employment by obtaining useful and needed work incentives.

ISSUE SUMMARY

In recent years, a number of changes have been made to public benefit and entitlements in order to eliminate programmatic disincentives to employment. In addition, a number of work incentives have been developed. These changes and developments have made it possible for a number of persons with disabilities to obtain and retain employment without jeopardizing benefits they continue to need. Unfortunately, the opportunities made possible by these developments are unavailable to many persons with disabilities, and without such opportunities, it is unlikely that these individuals will obtain work or continue to work.

- **Employed Persons with Disabilities Program**

State Medicaid Buy-In Programs, including Oregon’s Employed Persons with Disabilities (EPD) Program, have become a central element in the effort to make competitive

employment possible for persons with disabilities who have costly medical needs. These programs allow employed individuals with disabilities to receive Medicaid benefits while continuing to be employed. In the absence of such arrangements, most Buy-In enrollees could not afford to work because they do not have the income or insurance needed to pay for their health care expenses, and would have to quit working in order to obtain the Medicaid benefits that will cover the cost of their health care.

Oregon developed its Medicaid Buy-In program in 1999 after the Centers for Medicare and Medicaid (CMS) authorized the development of such programs. It was one of first states in the country to do so. Today, CMS is actively encouraging states to develop Buy-In programs and having such a program was a pre-requisite to obtaining a comprehensive Medicaid Infrastructure Grant. The structure of Buy-in programs and number of participants varies from one program to the next.

Enrollment in the EPD Program peaked several years ago at about 750 individuals. Today approximately 600 recipients are enrolled in the program. It appears that this decline is one consequence of the recession the state experienced several years ago and the resulting decline in jobs in Oregon.

Given the opportunity and benefit of the EPD Program, many Key Informants, Community Forum participants and Leadership Council members would like to see the EPD Program refined, strengthened, and when feasible, expanded. In addition, stakeholders recommended that the policies and practices of other state Buy-in programs be reviewed in order to learn about best and innovative policies and practices.

- **SSA Ticket-to-Work Program**

In 1999, the Social Security Administration (SSA) established the Ticket-to-Work program. Under this program, recipients are issued “tickets” that they may use to obtain vocational rehabilitation, employment and other services, and for a period of time may work without jeopardizing their SSI or SSDI benefits. Unfortunately, the Ticket-to-Work program has been significantly underutilized throughout the country, including Oregon. While there are over 110,000 Ticket holders in the state, most Ticket-to-Work Employment Networks (the public and private organizations designated by SSA to assist recipients in utilizing their Tickets) report that only a few recipients have active Tickets, and do not recommend that other organizations become employment networks.

SSA is presently considering making a number of changes to the Ticket program to make it easier for individual recipients to use their Tickets and for agencies involved with rehabilitation services.

A number of employment professionals who participated in developing the Blueprint recommended careful review of the Ticket program as it currently exists. It is their view that underutilization of the Ticket is partly the result of a lack of understanding of the current rules.

- **SSA PASS Program**

The Plan for Achieving Self-Support (PASS) program allows individuals with Supplemental Security Income (SSI) to save earned income to pay for employment

expenses, such as continued education or to buy business equipment. Using a PASS allows a person with a disability to save earned income without the income or savings counting against SSI asset limits.

- **Workers' Compensation Employer-at-Injury and Preferred Worker Programs**
In the late 1980s and early 1990s, Oregon's workers' compensation system restructured its vocational assistance programs and established two return-to-work programs. The Preferred Worker and Employer-at-Injury Programs provide a number of incentives to employers who hire or rehire workers who are injured on the job, including those sustaining permanent, disabling injuries. The use of these programs grew significantly for a number of years but employer participation subsequently declined. Additional changes were made to the programs by the 2005 Biennial Legislature in order to stimulate employer use of the programs.
- **Other Incentives and Disincentives**
Stakeholders also recommended the Project examine:
 - The benefit and feasibility of establishing Individual Development Accounts (IDAs) and other incentives currently unavailable in Oregon. IDAs are special bank accounts through which SSI and SSDI recipients may save for their education; the purchase of a home, assistive technology or other supports; or to start a business.
 - How to mitigate SSI and SSDI benefit offsets. Under certain circumstances, recipients engaging in work on a trial basis may have their benefits terminated abruptly. The results can be catastrophic for the individual and undermine whatever progress he or she has made in becoming employable. In addition, the presence of the offsets is a disincentive for those recipients who are considering trial work.

DATA SOURCES

- Issue briefs on possible modifications to EPD Program and development and use of Individual Development Accounts, prepared and submitted to the Project for consideration by Scott Lay, Advocate and Employment Consultant
- Oregon Medicaid Infrastructure Grant Evaluation Report: prepared and submitted to the previous MIG grant cycle by the Oregon Health Policy Institute, September 2004
- Ticket-to-Work [Program] in Oregon, concept paper, prepared by the Oregon Advocacy Center, December 2005
- Issue brief on Ticket-to-Work in Oregon, Molly Holsapple, Seniors and Persons with Disabilities cluster
- Federal Register, September 30, 2005, Volume 70, Number 189; Amendments to the Ticket-to-Work and Self-Sufficiency Program.
- Key Informant Interviews
- Leadership Council
- Community Forums

IMPLEMENTATION STRATEGIES AND ACTIVITIES

- 1. Develop and promote policies and practices that increase the usefulness, effectiveness and availability of work incentives and work incentive programs, and that lessen or eliminate disincentives to work.**
 - a. Analyze existing work incentive programs – including the EPD Program, SSA’s Ticket-to-Work and PASS programs, and Workers’ Compensation Return-to-Work Programs – and identify how these programs may be made more useful, effective and available; and develop and promote related policy and practical changes.
 - b. Identify and evaluate new, innovative and “best” work incentives – such as Individual Development Accounts and other incentives made possible through new Medicaid waivers in other states – and promote related policy and practical changes.
 - c. Identify and evaluate disincentives to work – including Medicaid offsets – and determine how their effects may be minimized, and recommend related changes.

ISSUE AREA D

Employee Supports and Work Incentives – Peer Mentoring and Advocacy

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
- √ Educate and engage employers to develop and market the “business case” for employing people with disabilities
- √ Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- Increase in the number of sites using peer mentors
- Increase in job placements and duration of employment

OBJECTIVE

Promote the use of peer-mentors as a support to persons with disabilities in seeking, maintaining and advancing in employment, and a support to employers.

ISSUE SUMMARY

A number of external supports and incentives exist for employers to strengthen the diversity of their workforce in the areas of recruitment and skills training. Fewer strategies and supports are available to assist people with disabilities and employers with incorporating people into company cultures and ways.

A number of advocacy organizations provide support to potential and currently employed persons with disabilities through “peer mentors.” Utilizing peer mentors may be a significant way to support people with disabilities in alleviating concerns or fears about the workplace, and developing an understanding and knowledge of workplace expectations.

Peer mentors may also be useful in assisting potential and current employers in addressing the concerns or fears they may have about hiring or retaining persons with disabilities, and in developing an understanding and knowledge useful in hiring, retaining, and promoting persons with disabilities.

DATA SOURCES

- Key Informant Interviews
- Community Forums
- Leadership Council

IMPLEMENTATION STRATEGIES AND ACTIVITIES

- 1. Promote the use of peer mentors as a useful employment support for persons with disabilities and employers.**
 - a. Develop and disseminate concept paper on peer mentoring as an employer support and its benefits.
 - b. Promote peer mentoring through the Project's public information activities and employer education and marketing campaign.
 - c. Incorporate peer mentoring practices in other strategies and activities, including those concerning supported employment and transition.
 - d. Promote and support policies and practices with public and private employers that facilitate the use of peer mentors.
 - e. Fund one or more replicable employment peer mentor initiative.

ISSUE AREA E

Employee & Employer Supports and Work Incentives – Culturally Competent Employment Supports and Services

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
- √ Educate and engage employers to develop and market the “business case” for employing people with disabilities
- √ Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- Increased representation of persons of color and ethnicity in planning activities surrounding employment of persons with disabilities.
- Increase in the number of employers of color and ethnicity providing competitive employment to persons with disabilities
- Increase in cultural and ethnic minorities with disabilities in competitive employment

OBJECTIVE

Make culturally appropriate and competent employment supports and services available to persons with disabilities from Oregon’s communities of color and ethnically diverse communities.

ISSUE SUMMARY

There is a critical need to expand the availability of bilingual, culturally and ethnically appropriate services (including outreach) in both urban and rural Oregon. Culturally appropriate services for communities of color and ethnic communities are nearly non-existent. Bilingual outreach and assessment services are also very limited. While the Project may not be able to directly address the need for greater program capacity, consideration should be given to supporting pilot projects or service delivery that make services and supports more accessible and that can be expanded and replicated. This effort should also include development of outreach strategies to promote competitive employment with employers of color.

DATA SOURCES

- Data about underserved populations in Oregon, provided by the Oregon Advocacy Center
- Oregon Business Leadership Network
- Key Informant Interviews
- Community Forums

- Leadership Council

IMPLEMENTATION STRATEGIES AND ACTIVITIES

- 1. Increase the accessibility and availability of culturally appropriate and competent employment services and supports to Oregonians with disabilities who are ethnic or cultural minorities.**
 - a. In collaboration with organizations and groups representing Oregon's communities of color and ethnically diverse communities, persons with disabilities, and other concerned parties, identify and analyze the strengths, weaknesses, and gaps in Oregon's system of employment services in serving and supporting Oregonians with disabilities who are ethnic or cultural minorities.
 - b. Develop and promote policies and practices that increase access to and the availability of needed, appropriate and competent services.
 - c. Fund one or more replicable initiative to increase accessibility to and availability of needed culturally appropriate and competent employment services and supports
 - d. Partner with others in allied efforts, including DHS' Diversity Initiative.

ISSUE AREA F

Youth and Family Supports – Transition

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
Educate and engage employers to develop and market the “business case” for employing people with disabilities
Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- Increase in the number of volunteers trained in employment issues involved in transition planning
- Increase in the number of students who initiate transition planning in middle school
- Increase in the number of young adults placed in competitive employment

OBJECTIVE

Support youth and adults with disabilities in successfully transitioning to the adult competitive employment system.

ISSUE SUMMARY

There is general consensus among stakeholders and experts that effective transition planning and timely and appropriate delivery of needed educational and vocational services and supports is the exception rather than the rule. The absence of planning and needed services and supports creates significant barriers to youth with disabilities who are attempting to make the transition from school to employment and self-sufficiency. Contributing factors include:

- Limited resources for transition planning
- Late initiation of the transition process
- Lack of collaboration between school special education programs and adult employment programs
- Limited availability of information, technical assistance and training for:
 - Youth, families and professionals involved in transition planning
 - Youth and families as they attempt to navigate those systems involved with transition (including state and local education, rehabilitation, disability and employment systems), and secure needed services and supports

Stakeholders and knowledgeable professionals also asserted that:

- There is a lack of understanding of person-centered planning tools and self-determination principles and processes within school settings and among vocational rehabilitation and employment providers; and that additional training of staff in these areas would increase the potential for youth to successfully transition.
- Adults with disabilities who have not been employed, or their employment has been limited to non-competitive or non-inclusive environments, have many of the same needs and face many of the same challenges in “transitioning” to competitive and inclusive employment.

DATA SOURCES

- “Strategic Planning Concept Paper: Youth Transition,” Janice S. Richards, Executive Director, The Oregon Parent Training and Information Center
- Key Informant Interviews
- Leadership Council
- Community Forums

IMPLEMENTATION STRATEGIES AND ACTIVITIES

Increase the awareness, understanding and knowledge that youth and adults-in-transition, families, teachers and disability professionals have of transition processes and transition planning; and, ensure that youth and adults-in-transition can effectively navigate Oregon’s educational, vocational, workforce development and public and private employment systems to seek, obtain and maintain competitive and inclusive employment.

1. Support development of a transition plan training program utilizing a train-the-trainers approach, to train parent volunteers and self-advocates to work with students, parents and agencies in developing effective transition plans.
2. Support reinstatement of an annual statewide transition conference for teachers, parents, students, case managers, vocational counselors, employers, and others.
3. Support development of a transition/employment program to assist youth and adults-in-transition and family members in developing person-centered employment plans and obtaining the knowledge, understanding, and skills needed to navigate educational, vocational and workforce systems; and teach youth and adults-in-transition to utilize the services and supports they need to carry out their plans and obtain employment. The program will take an integrated, holistic approach that will involve person-centered planning, job development, systems understanding, benefits planning, and advocacy.

ISSUE AREA G

Employer Supports and Incentives – Education and Technical Assistance

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
- √ Educate and engage employers to develop and market the “business case” for employing people with disabilities
- √ Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- An increase in the number of employers providing employment opportunities to persons with disabilities, including increased utilization of return-to-work programs.
- An increase in the number of persons with disabilities in competitive employment.
- The availability and use of education and marketing materials that promotes employment of persons with disabilities.
- Identifiable and active community partnerships involving employment providers and business associations.

OBJECTIVE

Develop and implement a comprehensive education and marketing strategy to support and promote employment of persons with disabilities with public and private employers, based on the business needs of employers and business case for competitive and inclusive employment of persons with disabilities.

ISSUE SUMMARY

- Large numbers of persons with disabilities remain unemployed or underemployed because employers often:
 - Do not understand that most persons with disabilities, including persons with significant or severe disabilities, are employable and capable of advancement. While many employers, like the other members of public, have become more aware of disability issues than they were in the past, they are uninformed or misinformed about the capacities and abilities of persons with disabilities.
 - Are unaware of the services, supports and incentives available to assist them employ persons with disabilities. The development of many employment supports – including work accommodations, assistive technologies and work incentives and subsidies for employers – are a relatively new occurrence, and many employers are not familiar with these developments or do not understand how to access them. In some instances,

employers know about the incentives but are dubious about the benefits of governmental programs or do not want to be burdened with “red tape.”

- Are unaware of how employing persons with disabilities may benefit them and their organizations or businesses. Few employers understand or appreciate the potential benefit of hiring persons with disabilities. For many employers, the daily demands of running a business or operating a program are taxing, and the prospect of employing a person or persons with a disability may be seen as an additional burden.
- The Oregon Business Leadership Network (OBLN) is an organization composed of representatives from local businesses and government agencies. OBLN provides workshops, trainings, tools and resources to make it easier for employers to support current employees with disabilities as well as those who become diagnosed with a disability during their working years. The OBLN focuses on leadership by example and is planning to develop local leadership networks throughout Oregon.
- Oregon business needs the ability and work ethic of all its citizens, including the 400,000 Oregonians with disabilities, to successfully compete for talent in a shrinking labor pool as boomers retire. According to the US Chamber of Commerce, industry reports consistently rate workers with disabilities above average in performance, attendance, and safety. Using Accommodation as a competitive strategy helps business attract and retain dedicated and skilled workers.

DATA SOURCES

- “Oregon MIG White Paper on Employer Supports to the Employment of People with Disabilities,” concept paper prepared by Lucy Baker, Oregon Business Leadership Network and Sharon Baggett
- “Oregon Business Leadership Conference: Business Case for Inclusion of People with Disabilities in the Competitive Workplace and Consumer Base,” prepared by OBLN for OBLN and in partnership with the Project
- Key Informant Interviews
- Community Forums
- Leadership Council

IMPLEMENTATION STRATEGIES AND ACTIVITIES

1. **Expand and utilize partnerships with Oregon Business Leadership Network, Employment Department, Governor’s Workforce Policy Cabinet, Department of Community College and Workforce Services, and others to:**
 - a. Refine the “business case” for employing persons with disabilities, including persons with significant or severe disabilities.
 - b. Inform employers and the business community about the Project and its mission, and engage it in a dialogue about employing persons with disabilities by presenting the business case for employment of persons with disabilities; and seeking to learn and

understand what employers want and need in order to hire, retain and advance the employment of persons with disabilities.

- c. Develop local business leadership networks and employer partners.
- d. Implement Project's educational and marketing campaign (see below) and sustain the campaign's accomplishments.

2. **Develop and implement a comprehensive educational and marketing campaign to promote employment of persons with disabilities by public and private employers.** In developing and implementing the campaign:

- a. Explore previous and other educational and marketing efforts and where successful strategies, activities and materials can be identified, utilize or incorporate these in the campaign.
- b. Determine what employers, from their perspective, need and want in order to hire, retain and advance persons with disabilities.
- c. Support, build-on and promote the concept of public employers as "model" employers of persons with disabilities.
- d. Identify and utilize "business champions" to model and promote employment of persons with disabilities and related "best practices" with employers.
- e. Present the business case for employing persons with disabilities.

ISSUE AREA H

Transportation

GOALS

- √ Empower people with all types of disabilities to obtain meaningful employment
Educate and engage employers to develop and market the “business case” for employing people with disabilities
- √ Enhance the availability and effectiveness of employment supports for persons with disabilities
- √ Enhance Oregon’s workforce system and expand its availability for persons with disabilities

OUTCOME INDICATORS

- Successful implementation of one or more projects to improve employment transportation for persons with disabilities
- Successful creation of five community transportation coordination plans with provisions regarding employment transportation for persons with disabilities.

OBJECTIVE

Expand transportation capacity to support competitive employment for people with disabilities with a priority on areas in which transportation services and supports are limited or non-existent.

ISSUE SUMMARY

Available, accessible transportation is essential to employment, self-sufficiency, and community participation. Transportation for people with disabilities, however, is limited in many parts of the state and largely non-existent in rural areas.

- The majority of Oregon’s population lives in urban areas, along the Interstate 5 corridor that runs north-south, or the Interstate 84 corridor that runs east-west. However, most of the state’s geography exists outside these “urban corridors,” and for the 25 percent of the state’s population who live in these rural or semi-rural areas, transportation is a major impediment to employment and other opportunities for inclusion in Oregon’s “greater community.”
- In those communities where public transportation is available, it is often unavailable to persons whose jobs require them to work a schedule that falls outside of the usual business day.
- The Oregon Department of Transportation (ODOT) is currently involved in community coordination planning initiatives to improve public transportation availability within local communities.

- ODOT identified several initiatives and funding sources that the project could utilize to improve employment transportation for persons with disabilities. Some of these include: Job Access Reverse Commute, United We Ride, Rural Operating Grants, the New Freedom Program, and Transportation Brokerages.
- The Department of Human Services and Office of Medical Assistance Programs are currently in the final stages of implementing a statewide network of Medicaid transportation brokerages, also known as “call centers,” with ODOT’s assistance. Eligible Medicaid recipients can call these brokerages to request non-emergency medical transportation.
- Stakeholders have identified increased collaboration between agencies and increased service integration as important strategies for improving transportation availability.

DATA SOURCES

- Concept Paper on “Transportation Coordination”, Martin Loring and Sherrin Coleman, Department of Transportation
- Key Informant Interviews
- Leadership Council
- Community Forums

IMPLEMENTATION STRATEGIES AND ACTIVITIES

In coordination and collaboration with Oregon Department of Transportation (ODOT), DHS Transportation Coordinator and the Oregon United We Ride Working Group, assist and support ODOT and local communities in implementing and sustaining one or more initiatives to increase the availability of transportation services and supports to persons with disabilities, with an emphasis on efforts that increase the availability of transportation services and support in areas of Oregon outside the I-5 and I-84 corridors and may be replicated in other communities.

1. Participate and assist non-profits, for profits, human services, state agencies and the Federal Transit Administration in local communities to create Community Coordination Plans for improving public transportation. The project will emphasize employment related transportation for persons with disabilities in these meetings.
2. Assemble a Competitive Employment Transportation workgroup, or coordinate with an existing transportation workgroup to:
 - a. Evaluate strategic opportunities to leverage funds for transportation necessary for persons with disabilities to obtain and maintain employment, based upon the initiatives identified by ODOT.
 - b. Identify potential projects based on geographic features, existing transportation supports, and potential impact on services.
 - c. Recommend transportation projects, with priority consideration given to:

- i. Enhancing the capacity of the regional transportation call centers to include transportation for employment
 - ii. Establishing a joint position with ODOT and the Project to coordinate employment related transportation efforts with local governments, DHS, and ODOT
 - d. Increasing collaboration and communication between stakeholders.
- 3. Implement one or more projects to improve employment transportation for persons with disabilities, based on the above recommendations.

APPENDIX

Note: **The contents of this Appendix – the Logic Models, the Work Plan, Meeting Agendas and Minutes, and Concept Papers and Issue papers – are available upon request.**