

## IPS Program Implementation Plan for Agencies

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>Funding</u></p> <p>Investigate possible sources of funding. In the U.S., sources may include:</p> <ul style="list-style-type: none"> <li>• Vocational Rehabilitation (VR), which may require accreditation, such as Commission on Accreditation of Rehabilitation Facilities (CARF) accreditation, to become a Community Rehabilitation Provider (or “vendor”) for VR. This varies by state. Contact state VR.</li> <li>• State or county mental health funding.</li> <li>• Medicaid for medically necessary services that occur within the context of employment (talk to state mental health about your state’s Medicaid plan).</li> <li>• Grants.</li> <li>• Identify funding for each step of the vocational process.</li> </ul>			

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>IPS Program Supervision</u></p> <ol style="list-style-type: none"> <li>1) One full-time supervisor is responsible for no more than 10 IPS team members.</li> <li>2) Supervisor has responsibilities for only IPS if supervising 5 or more people.</li> <li>3) Supervisor may have a small caseload (2-3 people).</li> <li>4) Weekly group supervision with IPS team focuses on client goals, employer relationships, and celebrations.</li> <li>5) Field mentoring: teaches job development by going with employment specialists to meet with employers monthly.</li> <li>6) Supervisor monitors client outcomes quarterly for team (%/# employed, # on caseloads, # closed from IPS while working, # job starts...) and individual specialists. Helps set goals for improvement.</li> </ol>			

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>Employment Specialist Positions</u></p> <p>1) Caseloads of 20 or less.</p> <p>2) Provides full-range of employment services to caseload, including job development.</p> <p>3) Provides employment services only.</p> <p>4) Spends at least 65% of total work hours in the community.</p> <p>5) IPS team members reflect the cultures of the people they serve, or are educated about different cultures.</p> <p>6) Team may include people with lived experience of mental illness as employment specialists or peers.</p>			

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>IPS Training</u></p> <ol style="list-style-type: none"> <li>1) IPS principles. For IPS team, Vocational Rehabilitation (VR) counselors, and mental health practitioners.</li> <li>2) Developing employer relationships. For IPS team (and invite VR counselors).</li> <li>3) Discussing options for disclosure of a disability at work. For IPS team (invite VR).</li> <li>4) Active listening skills. For IPS team.</li> <li>5) Helping people consider employment. For mental health practitioners.</li> <li>6) Job supports. For IPS team (invite VR).</li> <li>7) IPS overview. For local NAMI chapter or other family and client advocacy groups.</li> <li>8) Other possible training: Training from IPS state trainers, The IPS Employment Center online course for IPS practitioners and the online course for IPS supervisors, The IPS Employment Center's in-person IPS Leadership Training. <a href="http://www.IPSworks.org">www.IPSworks.org</a> , select Training and Consultation.</li> </ol>			

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>Integration of IPS and Mental Health Services</u></p> <p>1) Each employment specialist is assigned to only 1-2 mental health teams and receives at least 90% of referrals from those teams.</p> <p>2) Employment specialist office space is located with mental health practitioners, regardless of whether IPS program is in separate agency from mental health agency.</p> <p>3) Employment specialists attend weekly mental health team meetings for each team to which they are assigned. Meetings focus on client situations (mental health or employment). Employment specialists attend and participate in entire meeting.</p> <p>4) Client records are integrated (mental health and employment documents are in the same record).</p>			

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>Collaboration with Vocational Rehabilitation</u></p> <ol style="list-style-type: none"> <li>1) Vocational Rehabilitation (VR) counselors know about IPS practice principles. <ul style="list-style-type: none"> <li>• They discuss strategies to expedite eligibility process when possible.</li> <li>• They adhere to zero exclusion criteria for most people (in any point in time, a few people in the IPS program may not have open VR cases).</li> </ul> </li> <li>2) VR counselors meet with the IPS team at least monthly to discuss how to help people with their employment goals.</li> <li>3) The mental health agency offers opportunities for VR counselors to visit (at least some) mental health team meetings in order to better coordinate services for clients.</li> <li>4) The VR supervisor considers assigning 1 or 2 VR counselors to the IPS program so that they can develop relationships with the IPS team and learn about the IPS approach.</li> <li>5) See Steering Committee and IPS Training.</li> </ol>			

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>IPS Steering Committee</u></p> <p>1) Convene a diverse group of stakeholders to support IPS implementation and sustainability. Members include family members, clients, IPS supervisor, clinical director, Vocational Rehabilitation (VR) counselors and/or VR supervisor. At least one high-level leader from the agency (such as quality assurance director, fiscal director, or executive director) should also participate. If a mental health agency and separate employment agency are collaborating on IPS, members of both agencies should participate in the steering committee.</p> <p>2) Committee meets at least quarterly during implementation to discuss implementation plan and progress on fidelity. After good IPS supported employment fidelity is achieved, committee meets at least twice each year.</p> <p>3) Committee develops strategies for all eligible people to learn about the IPS program.</p>			

Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>IPS Supported Employment Fidelity</u></p> <p>1) Arrange a baseline fidelity review after 6 months of implementation and then every 6 months until good fidelity is achieved. Yearly reviews thereafter to sustain the program.</p> <p>2) Ideally, trained reviewers from outside of the agency are available for fidelity reviews. If someone within the agency (such as a quality assurance director) will apply the fidelity scale, it is strongly recommended that the person attend state fidelity review training or Leadership Training from the IPS Employment Center.</p> <p>3) Develop a written fidelity action plan in response to each fidelity report.</p> <p>4) Include the fidelity review, or aspects of the review, in the agency quality assurance process.</p>			



Implementation Area	Action Steps	Responsible Person(s)	Target Date
<p><u>Benefits Planning</u></p> <p>1) Investigate options for clients to receive benefits planning (information about how disability benefits, housing subsidies, food subsidies, etc.) would be affected by a return to work.</p> <p>2) Ensure benefits planners have extensive training and receive ongoing updates as rules for benefits change.</p>			

Roadmap: Implementing IPS Supported Employment at the Local Level  
Stages, Strategies, and Tools

Stage	Audience	Strategies	Tools and Actions for State Leaders
Assess readiness to implement	<ul style="list-style-type: none"> <li>• Mental health agency leadership</li> <li>• Local VR office leadership</li> </ul>	<ul style="list-style-type: none"> <li>• Determine whether leaders are knowledgeable about how IPS is different from other employment approaches. What are their reasons for considering IPS? What would be the value of IPS for each organization? What major changes in organizational structure, policies, or practices would each agency need to consider?</li> <li>• Ask leaders about possible barriers and facilitators to implementation.</li> <li>• Identify other programs that might compete with IPS implementation. For example, employment groups or other types of employment programs.</li> <li>• Determine who might lead implementation at each agency.</li> <li>• Discuss the value of collaboration between the agencies. How is collaboration now? How might it be strengthened?</li> <li>• Define terms for common language.</li> </ul>	<ul style="list-style-type: none"> <li>• Sample questions for agency leaders (attached)</li> <li>• In-person meetings with presence from state leadership</li> <li>• Agency agreements for training.</li> <li>• Communications for state leadership.</li> <li>• Descriptions of the International IPS Learning Community from <a href="http://www.IPSworks.org">http://www.IPSworks.org</a></li> </ul>

<p>Secure commitment from agency leaders to implement IPS</p>	<ul style="list-style-type: none"> <li>• Mental health agency leadership</li> <li>• Local VR office leadership</li> </ul>	<ul style="list-style-type: none"> <li>• Stress the critical role of leadership in program development for IPS. Provide examples of ways that leaders can help with implementation.</li> <li>• Secure commitments from leadership to attend training with their staff and to communicate the importance of change to their staff.</li> <li>• Secure commitment to develop and participate in a performance improvement team.</li> <li>• Determine whether the VR office can assign one or two liaisons to the IPS program, or if all VR counselors will use the IPS approach.</li> <li>• Talk about the current fee schedule for VR (if any). Does each service on the fee schedule support or conflict with IPS?</li> </ul>	<ul style="list-style-type: none"> <li>• Winter 2011 IPS Newsletter</li> <li>• Sample job descriptions for employment specialists and IPS supervisor.</li> <li>• Brochure and video about IPS for VR counselors.</li> <li>• IPS Program Implementation Kit.</li> <li>• Supported Employment Fidelity Scale, 2008, and Fidelity Review Manual (2015).</li> </ul>
<p>Build consensus with stakeholders</p>	<ul style="list-style-type: none"> <li>• Mental health and VR leadership</li> <li>• Middle management from mental health and VR agencies</li> <li>• Mental health practitioners</li> <li>• VR Counselors</li> <li>• Employment specialists</li> <li>• Clients</li> <li>• Families</li> </ul>	<ul style="list-style-type: none"> <li>• Convene multiple brief meetings to discuss the rationale for the new practice and to describe IPS.</li> <li>• Use the meetings to distribute educational materials for various stakeholder groups.</li> <li>• Ask groups for advice about how to inform all eligible clients about the new program and how they will be able to access IPS services.</li> <li>• Explain how stakeholders can be part of implementation through steering</li> </ul>	<ul style="list-style-type: none"> <li>• Videos such as the Introductory Video or 3 Faces, 3 Lives</li> <li>• Introductory PowerPoint about IPS</li> <li>• Employment posters</li> <li>• IPS brochure (8-page brochure)</li> <li>• VR video and brochure for VR counselors</li> </ul>

	<ul style="list-style-type: none"> <li>• Others</li> </ul>	committees, participation in fidelity reviews, and so forth.	
Build the IPS team	<ul style="list-style-type: none"> <li>• Mental health agency management</li> </ul>	<ul style="list-style-type: none"> <li>• Help management identify effective characteristics for IPS staff, such as persistence, hopefulness, creative problem-solving, ability to work with employers, and so forth.</li> <li>• Suggest that staff already present in the agency may, or may not, be a good fit for the IPS program.</li> <li>• Ask management if they would consider asking VR for suggestions for local people to interview, or including the VR supervisor or assigned liaison in final interviews.</li> <li>• Assist management in setting job expectations for IPS positions. For example, minimum number of job starts.</li> </ul>	<ul style="list-style-type: none"> <li>• Sample job descriptions for employment specialists and IPS supervisors</li> <li>• Sample interview questions for employment specialists</li> <li>• Offer to participate in interviews</li> </ul>
Structure the IPS program	<ul style="list-style-type: none"> <li>• Mental health agency management</li> <li>• IPS supervisor</li> <li>• VR supervisor or assigned counselor</li> </ul>	<ul style="list-style-type: none"> <li>• Use multiple meetings with agency management and IPS supervisor to discuss frequency of vocational unit meetings, assignment of employment specialists to mental health teams, location of offices, integration of client records, outcomes to be monitored, and so forth.</li> <li>• Meet with VR and the IPS supervisor to discuss resources for benefits planning.</li> <li>• If needed, meet with VR office and mental health agency management to discuss needed changes in the fee</li> </ul>	<ul style="list-style-type: none"> <li>• In-person meetings with state leadership and/or IPS trainer.</li> <li>• IPS trainer to begin attending vocational unit meetings twice a month to help team develop productive meetings.</li> <li>• IPS trainer to begin attending some mental health treatment team meetings each month to model how to integrate services and how to apply zero exclusion principle. Also to explain to team why</li> </ul>

<p>Structure the IPS program (continued)</p>		<p>schedule. For example, if fee schedule includes situational assessments, how will that change and when?</p> <ul style="list-style-type: none"> <li>• Meet with IPS supervisor, mental health middle management and local VR office to discuss current efforts to collaborate and to develop steps for improved collaboration. Will the VR counselor attend vocational unit meetings or will the IPS staff come to the VR office? How often? Will VR staff ever attend mental health treatment team meetings? How will the agencies manage HIPAA compliance? How will referrals be managed between the two agencies?</li> <li>• Meet with IPS supervisor and mental health management to talk about how the IPS program can improve cultural competence. Are there groups of people who use agency services who might need extra outreach to consider the program? How will employment specialists know if a person would like services to be provided in a way that is congruent with his culture?</li> <li>• Meet with IPS supervisor to discuss record keeping for IPS specialists. How will they document client services? How will they update the career profile? How will they track employer contacts?</li> </ul>	<p>the employment specialist cannot help with case management.</p> <ul style="list-style-type: none"> <li>• Sample program forms on Dartmouth PRC website.</li> </ul>
--	--	---	---

<p>Build support for the IPS program through a performance improvement team (sometimes called a steering committee or leadership committee)</p>	<p>All members of the performance improvement team, for example, representatives from the mental health agency, IPS supervisor, VR counselors, family members, clients. The team might also add an employer or representative from local education institution over time.</p>	<ul style="list-style-type: none"> <li>• Provide basic education about IPS. For example, the eight practice principles.</li> <li>• Asking a working person to talk about his or her return to work and the value that work has in her life.</li> <li>• Provide basic information about the IPS Fidelity Scale. (Over time the team will review fidelity reports and help with fidelity action plans.)</li> <li>• Facilitate the team in setting up a regular meeting schedule.</li> <li>• Help the team develop agendas for the first few meetings.</li> </ul>	<ul style="list-style-type: none"> <li>• IPS Employment Center videos.</li> <li>• Handout about the eight practice principles</li> <li>• IPS brochure</li> <li>• Information about program benchmarks (Becker, Bond, 2012)</li> <li>• Handout about steering committees</li> <li>• Supported Employment Fidelity Scale, 2008</li> <li>• Attendance at performance team by state implementation team and/or state trainers</li> </ul>
<p>Provide skills training (and develop skills in the field)</p>	<ul style="list-style-type: none"> <li>• IPS Supervisor</li> <li>• Employment specialists</li> <li>• VR supervisor and counselor</li> <li>• Mental health practitioners</li> </ul>	<ul style="list-style-type: none"> <li>• Provide training to the IPS team regarding the IPS approach, conducting the career profile and engaging people, individualized job search, building employer relationships, job supports and education supports, shared decision making, and Motivational Interviewing skills. Provide a mixture of didactic training and training in the field. For example, talk about job development and then go out with employment specialists to meet with employers. Repeat field training until practitioners demonstrate mastery.</li> <li>• Invite VR counselors to attend the above trainings, as their schedule permits.</li> </ul>	<ul style="list-style-type: none"> <li>• IPS supported employment PowerPoint</li> <li>• Sample Training Plan</li> <li>• Videos</li> <li>• Booklet for developing relationships with employers</li> <li>• IPS workbook</li> <li>• Other materials on website</li> <li>• Attendance in team meetings to help practitioners plan services that are congruent with IPS principles.</li> </ul>

Provide skills training (continued)		<ul style="list-style-type: none"> <li>• Meet with VR counselors at their office to talk about their goals and/or concerns about the new approach. Provide information about IPS.</li> <li>• Provide training to mental health practitioners about how to engage people in thinking about employment and zero exclusion. Include strategies for working with people who have co-occurring disorders.</li> </ul>	
Implementation monitoring	<ul style="list-style-type: none"> <li>• Mental health agency leadership and management</li> <li>• VR leadership and management</li> <li>• IPS performance improvement team</li> <li>• IPS supervisor</li> </ul>	<ul style="list-style-type: none"> <li>• Completion of IPS fidelity review</li> <li>• Presentation of findings to IPS performance improvement team and management.</li> <li>• Development of action plan to improve fidelity and outcomes. Includes assignments for individuals to complete tasks. For example, the agency IT department might set up a system to track who is employed. The IPS trainer might be responsible for additional job development training.</li> <li>• Agency QA process begins to fold IPS into indicators.</li> </ul>	<ul style="list-style-type: none"> <li>• IPS Fidelity Manual</li> <li>• IPS report written by reviewers for the agency</li> <li>• Sample fidelity action plans</li> <li>• Agency outcomes for the IPS team</li> <li>• Agency data regarding the number/percent of people in the agency who are employed</li> <li>• Provide fidelity reviews every six months until good fidelity is achieved and annually afterwards</li> </ul>

<p>Consultation to leadership and management during program implementation</p>	<ul style="list-style-type: none"> <li>• Mental health agency leadership and management</li> <li>• VR leadership and management</li> </ul>	<ul style="list-style-type: none"> <li>• Request regular meetings to discuss progress.</li> <li>• Provide multiple methods for leaders and managers to contact state trainers and state implementation team members.</li> <li>• Ask how leaders would like to be updated about when ongoing training and consultation will be taking place at the agency.</li> <li>• Discuss agency goals for IPS.</li> <li>• Discuss ongoing issues regarding potential challenges in IPS. Also celebrate successes with leaders and managers.</li> <li>• Ask how you can be helpful to the agencies.</li> </ul>	<ul style="list-style-type: none"> <li>• IPS trainer and/or state implementers to request meetings during implementation process</li> </ul>
<p>Focus on building supervisor expertise in order to enhance agency autonomy over time.</p>	<ul style="list-style-type: none"> <li>• IPS supervisor</li> </ul>	<ul style="list-style-type: none"> <li>• State-wide quarterly supervisor meetings.</li> <li>• Meetings with supervisor to review program outcomes and discuss plans for improved outcomes. Also, to talk about how to help individual practitioners improve performance.</li> <li>• Model field training for supervisor (see skills training above).</li> <li>• Provide feedback to supervisor after team meetings.</li> </ul>	<ul style="list-style-type: none"> <li>• Supervision tools at <a href="http://www.IPSworks.org">http://www.IPSworks.org</a></li> <li>• Facilitation of statewide supervisor meetings</li> <li>• IPS Learning Community outcomes and graphs</li> <li>• Field mentoring logs</li> </ul>



### Sample Questions for Agency Leaders

1. What do you know about how IPS is different than other employment programs, or what would you like to know?
2. Why are you considering IPS for your agencies?
3. What major changes in organizational structure, policies, or practices would each agency need to consider? What are the barriers and facilitators to IPS implementation?
4. How many people with severe mental illness at the mental health agency are employed? How many people with severe mental illness are served by VR?
5. Are there other local programs that could compete with IPS? For example, does the agency have a janitorial work crew that operates as a training program?
6. What has the mental health agency done to promote recovery?
7. How would clients be involved in implementation?
8. How would leaders help with implementation? Who will be responsible for implementation?
9. Will agency leaders participate in training?
10. How does employment fit with the mission of the agency? What are the most important goals of the agency?
11. Does the agency have a vendor relationship with VR?
12. How does the mental health agency currently collaborate with VR? What works about the relationship? What doesn't? How do leaders think it could be improved?

## Hiring IPS Employment Specialists

### Background and Experience

Many supervisors report that they attempt to hire people who have marketing or sales experience. Others hire people who have been employers in the past, and still others hire people who have a background in providing mental health services. Obviously, all of these types of experiences would be helpful to an employment specialist, though it is usually quite difficult to find someone who has such a varied background.

Another approach is to think about the personality type of a successful employment specialist. For example:

A recovery-oriented candidate is someone who:

- is hopeful about every person's ability to succeed in employment
- is open minded about helping people move into competitive jobs, regardless of active substance use disorders
- believes that work can help people manage mental illness
- believes that people learn and grow from their experiences.

A creative problem-solver is someone who:

- asks questions to learn more about a problem
- changes her perspective about a problem by learning new information
- can think of more than one possible solution to a problem.

A candidate who is genuinely interested in the job:

- would attempt to learn about IPS supported employment (interviewers can provide the link to Dartmouth PRC employment webpage: <http://www.ipsworks.org>)
- would ask questions about the job and their potential job duties.

A candidate who would be a good job developer:

- would present him or herself in a professional manner
- may have a gregarious, "sales" personality or may be quiet, but persistent
- would be a good listener—interested in learning about other people.

One strategy for finding people who understand recovery from mental illness is to hire employment specialists who have lived experience of mental illness. Some supervisors add the following statement to job advertisements, "People with a lived experience of mental illness are encouraged to apply." If a candidate identifies as having a mental illness, the interviewers ask if he would be willing to share how he overcame barriers to employment with some of the people on his caseload. They

view the lived experience as an extra qualification for the job.

Supervisors also consider the cultures of the people served by the IPS team when they hire employment specialists so that at least some team members will reflect those cultures. To recruit candidates from other cultures they might advertise at community centers such as centers for people from a particular ethnicity or at a lesbian, gay, bi-sexual, transgender center. Job advertisements might specify that fluency in a particular language is advantageous or the advertisement might be placed in a newspaper that targets a specific cultural group.

### Sample Interview Questions

Below each question are suggestions regarding what the interviewer should listen for in the candidate's response.

Did you have a chance to read about IPS supported employment? Based on that, what do you think a typical day would be like? (While setting up the interview, share the following website with the candidate: <http://www.ipsworks.org>)

- *Was the candidate interested enough to read about IPS? Does the person have a good understanding of the job?*

What would you enjoy about this job? What would you not enjoy about this job?

- *Does the person have a good understanding of the job? Is the candidate able to provide a thoughtful, honest response about parts of the job she would not enjoy?*

How do you go about finding jobs for yourself?

- *What type of job search skills does the person use? Is networking one of the strategies he uses to find jobs?*

What would you do if one of your clients began missing appointments?

- *Does the response seem to blame the client or is the candidate using more of a problem-solving approach?*

What do you think about helping people with active substance use problems find employment?

- *Does the person have an opinion about waiting for people to become sober? If so, how does the candidate respond to information from the interviewer about zero exclusion?*

What would be your expectations for the people you would serve?

- *Beware of answers similar to the following: "People have to be working as hard as I am with the job search"? "People have to show up dressed like they would if they were interviewing for a job." If people miss appointments then they must not want to work."*

How would you learn about employers and their job opportunities within this community?

- *Does the person have creative ideas? Does the candidate think of ways to get out of the office to meet employers or does the candidate suggest using websites only?*

How would you build credibility and strengthen relationships with employers?  
*- Does the person have ideas such as in-person meetings, following through with what she says she will do, listening to what is important to the employer...?*

Role-play: Candidate is approaching a restaurant manager for the very first time. Candidate has a client in mind—a person who is interested in food prep.  
*- This exercise may be difficult for someone who has never done job development, but see if the candidate listens carefully to the employer, talks about her client's strengths, asks questions....*

Role-play: Candidate is going back to the restaurant after the person has been working for one week. Manager reports that the worker is too slow on the job.  
*- Does the candidate try to ask questions to learn more about the cause of the problem?  
Does the candidate listen carefully to the employer to learn what is important to him?  
What type of solutions does the candidate propose – more than one?*

What languages do you know? Are you fluent in those languages?  
*- Does the candidate have special language skills similar to those people served at your agency?*

Why do you think it would be important to stay in close contact with the mental health team? With Vocational Rehabilitation counselors?  
*- Does the candidate know how to work as a team member? Does the candidate value the contributions of others?*

What do you hope to be doing in five years?  
*- Does this job fit the person's work interests?*

For candidates who do not have mental health experience but who are final candidates for the job: Offer to let them shadow an employment specialist for a few hours. Ensure that the employment specialist will be working in the community, contacting employers, visiting people at their homes, etc. (Be sure to have completed releases in advance of going out with the candidate.)  
*- Does the candidate think that this is work s/he will enjoy? Does it feel okay to go into people's homes? To spend his/her days in the community, out of the office? Does the candidate think that s/he would enjoy job development and be able to develop good skills over time? Does s/he understand that developing relationships with employers would be part of his/her weekly responsibilities?*

### Employment specialist competencies

Develops relationships with employers by learning about their businesses, hiring practices, hiring preferences etc., over multiple visits.

Investigates the local business community in order to learn about different employers and types of jobs available.

Utilizes good client interviewing skills in order to learn about individual preferences, past experiences, hopes and concerns regarding employment.

Effectively collaborates with mental health practitioners, VR counselors, family members and other members of the vocational unit.

Utilizes a strengths-based approach when serving clients by recognizing each person's skills, experiences, and values that support employment.

Employs a recovery-based orientation including the belief that people learn from their experiences, develop new skills, and achieve life goals over time.

Applies new work methods, skills and technologies to complete work.

Assists with finding and accessing resources such as work incentives planning, local schools, available transportation, etc.

Uses a problem-solving approach when faced with challenging or difficult situations.

Conducts work in community settings (at least 65% of scheduled work hours).

Assists individuals to analyze each work experience for lessons learned, using input from employers, the worker, mental health practitioners, Vocational Rehabilitation counselors, family members or others. Also, analyzes what he might have done different to provide better supports or more effective job matching.

Writes person-specific plans that are congruent with each person's goals and includes specific steps that will be taken to meet those goals.

Provides timely documentation that meets requirements of various funding sources including Vocational Rehabilitation, Medicaid, and others.

## Sample IPS Supported Employment and Education Specialist Job Description

**Overall Function:** Carries out the services of the IPS Supported Employment program by assisting clients to obtain and maintain employment that is consistent with their vocational goals. Provides support for schooling and technical training for career advancement.

**Responsibilities:**

Engages clients and establishes trusting, collaborative relationships directed toward the goal of competitive employment in community job settings with other workers who do not necessarily have disabilities.

Assists clients in obtaining individualized information about how entitlements (e.g., SSI, Medicaid, etc.) will be affected by employment so clients can make decisions about employment opportunities. Refers clients to benefits counseling, as needed. Helps clients report earnings, as needed.

Assesses clients' vocational skills and preferences on ongoing basis utilizing background information and work experiences. With the client's permission, provides information and support to family members. Discusses client's preference for disclosure of mental health status to employers.

Helps clients learn about different jobs/careers by assisting with meetings with workers/managers to ask about positions that interest clients, meetings with academic advisors, observing workers (one day or less in duration), and job fairs to speak with employers about different types of jobs.

Conducts job development and job search activities directed toward positions that are individualized to the interests and uniqueness of the people on his/her caseload, following the principles and procedures of IPS supported employment.

Conducts an average of six employer contacts per week. Employer contacts are designed to learn about the needs of the business, describe supports offered by the program, and describe client strengths that are relevant to the position.

Provides individualized follow-along supports to assist clients in maintaining employment. Writes job support plans with clients and incorporates input from family members (with client permission) and the mental health team. Adjusts plan according to clients' needs and preferences.

Provides education and support to employers as agreed upon by clients. May negotiate job accommodations and follow-along contact by the IPS specialist with the employer.

Provides outreach services as necessary to clients when they appear to disengage from the service. Uses a variety of methods to provide outreach.

Provides timely interventions. Returns phone calls and reacts to situations in a timely manner. For example, returns client phone calls within 24 hours. Goes to see employers about job loss or job problems within 24 hours. Follows up on job leads within 48 hours. Meets with clients within one week prior to job starts and within three days after job starts.

Participates in weekly meetings with mental health treatment team and communicates individually with team members between meetings in order to coordinate and integrate vocational services with mental health treatment.

Participates in face-to-face meetings with state Vocational Rehabilitation (VR) counselors at least once a month to coordinate services for clients. Collaborates with individual counselors between meetings to assist clients.

Responsible for a minimum of \_\_\_\_\_ number or job starts per year or maintaining at least\_% employment on caseload.

Develops an individual employment and/or education plan with clients. Incorporates input from mental health team and family members, with client permission.

Spends 65% or more of scheduled work hours in the community, for example, meets clients at their homes, workplaces, coffee shops, libraries, One-Stop offices, state VR office, family homes, helps clients follow up on job applications, and goes with clients to visit local GED programs and colleges.

Attends high school meetings with teachers, such as Individual Education Program (IEP), 504 Plan, and Transition Plan meetings, to discuss how students learn best and ways that the IPS specialist can support the student's education.

Assists clients in learning about different education and vocational training programs related to client interests and academic aptitudes. Focuses on mainstream education and certificate training programs only.

Provides supports with financial aid including the annual Free Application for Federal Student Aid (FAFSA), understanding loan obligations, applying for scholarships, obtaining tools, equipment and computers.

Offers supports prior to the beginning of education programs including accompanying new students on campus/school tours, buying books or supplies, applying for services with the Office of Disability Services, signing up for seminars on effective study skills, discussing where to study between classes, etc.

Offers help managing school schedule including due dates for assignments, reserving time to study for exams, and keeping track of class drop dates.

Collaborates with counselors at the Office for Disability Services, professors/instructors, and counselors at the Financial Aid Office, as needed.

**Qualifications:** Education and experience equivalent to undergraduate degree in mental health, social services, or business. Experience working with people with severe mental illness, experience providing employment services, and knowledge of the work world are preferred.

Ability to work as an effective team member is essential.

## **Sample Job Description for IPS Supported Employment Supervisor**

**Overall Function:** Provides oversight to the IPS supported employment program. Ensures good program outcomes by providing training, supervision, and by working side-by-side with employment specialists (field mentoring). Attempts to meet most people who receive IPS services. Monitors outcomes and implements quality improvement plans. Acts as a liaison to other departments and agencies. Supervises up to ten employment specialists. Provides IPS supported employment services for a caseload of two or three people.

### **Responsibilities:**

Hires, trains, and evaluates employment specialists. Develops expectations for specialists regarding employer contacts, number of job starts each quarter, and employment rate (percentage of people employed on each caseload).

Assigns each employment specialist to one or two mental health teams. Attends each mental health treatment team monthly to enhance integrated services.

Conducts weekly group supervision following the principles of IPS supported employment.

Provides individual supervision for employment specialists. Supervision includes some office-based sessions, as well working side-by-side with specialists. Provides frequent (weekly or every other week) field mentoring for specialists who are new to their jobs, and those with outcomes that are less than desired.

Collects client outcomes on a monthly basis. Shares outcomes for the program, as well as individual practitioners, with the IPS supported employment team each quarter. Helps team members set goals for improvement. Reviews individual outcomes with each practitioner and develops written plans for improvement. Helps specialists refine their skills so they can improve outcomes.

Acts as a liaison to other department coordinators and administrators at the agency. Communicates regularly with mental health supervisors to ensure that services are integrated, to resolve issues, and to act as a proponent for employment.

Works with the office of Vocational Rehabilitation to coordinate services. Requests monthly meetings between Vocational Rehabilitation counselors and IPS team members to discuss how to help people served by both agencies.

Arranges for IPS supported employment fidelity reviews. Assists with the development of fidelity action plans based on recommendations from the fidelity report.

Leads or participates in steering committee meetings to help with IPS supported



employment implementation and sustainability.

Provides IPS supported employment services to a caseload of two to three people.

Qualifications: Master's degree in rehabilitation counseling or related field is preferred. Bachelor's degree is required. Previous experience in the mental health field is desired (for IPS programs serving people with serious mental illness). Previous supervisory experience is valued.

## **IPS Steering Committees**

Steering committees, also referred to as stakeholder or leaderships groups, help plan and monitor IPS supported employment implementation and sustainment.

### **Purpose:**

Steering committees keep agency staff members focused on IPS implementation. Supervisors and administrators are busy and it is possible that good intentions are forgotten in the rush of daily work. Knowing that a group of stakeholders will soon convene to discuss program implementation incentivizes people to follow through with activities that help the IPS program. Another function of steering committees is to keep stakeholder groups, such as clients, Vocational Rehabilitation counselors, and family members, informed about the new practice. Finally, stakeholders provide valuable ideas and feedback to help the agency provide services in an effective manner.

### **Members:**

Steering committees strive to include a diverse range of stakeholders that may change over time depending upon the needs of the program. Participants may include:

- Agency administrators
- Family members and/or family advocacy groups
- Clients and/or peer advocacy groups
- IPS supervisor
- Vocational Rehabilitation supervisor and/or counselors
- Clinical director or a mental health supervisor
- Local chamber of commerce or economic development group
- Others (transportation providers, local college representative, ...)

Many steering committees also include employers, though employers are busy and need to know that their time is used well. One solution is to invite an employer who would not attend every meeting, but only those meetings in which her expertise was required. Another solution is to include a family member who is also a business owner or manager and can contribute from both perspectives. Each steering committee member should understand his/her role on the committee. People who do not feel useful on the committee will likely lose interest and stop participating.

### **Frequency of Meetings:**

Initially steering committee meetings should meet at least once each quarter. After the program achieves good fidelity, the group may decide to meet just twice each year. Steering committees continue to meet even after the program is well established because steering committees can help sustain the program.

Internal workgroups (usually a few people from the agency) should also meet on a monthly basis while the program is in start-up phase. These workgroups are usually comprised of three or four people who know the agency well and have the authority to make changes, for example, the quality assurance director, the clinical director and the IPS supervisor.

### **Educating Committee Members:**

The first task for each committee is to ensure that all members understand basic information about IPS, including the eight practice principles. Resources to educate steering committees can be downloaded from <http://www.IPSworks.org> . A video entitled “Introduction to Supported Employment” provides information about IPS principles along with the stories of people who have returned to work (see About IPS).

### **Activities:**

During implementation steering committees:

- Learn about IPS supported employment
- Examine the agency and system of care for policies or practices that conflict with IPS
- Review current employment outcomes, if available
- Build consensus for IPS by asking working people to share their stories and by talking about the relationship between work and recovery
- Discuss plans for IPS implementation, for example, begin reviewing the IPS supported employment fidelity scale to determine areas where change is needed

After the first IPS supported employment fidelity review, steering committees review the fidelity report and discuss which items to focus on first. For example, to improve fidelity to Zero Exclusion Criteria, committee members would brainstorm ideas to help people access IPS. They might discuss training so that mental health practitioners would understand that people can work successfully in spite of psychiatric symptoms, housing problems, substance abuse disorders, etc. If the group wants to improve Collaboration with Vocational Rehabilitation they might brainstorm ideas for the IPS team to meet with Vocational Rehabilitation counselors on a monthly, or more frequent, basis.

Over time the committee would continue to work on improving and sustaining good fidelity. They would monitor employment outcomes and discuss strategies to increase the number of working people in the IPS program or in the entire agency. Group members also talk about issues related to sustaining the program, such as funding, or issues related to expanding the program so that more people can go to work.

## Pre-Implementation IPS Steering Committee

### Sample Meeting Agenda

Participants: Nicole Avery, Mental Health Agency Director  
Pete Grant, Mental Health Agency Clinical Director  
Bill Amos, Mental Health Board Member  
Sherry Dyer, Vocational Rehabilitation Supervisor  
Chris Turner, Vocational Rehabilitation Area Manager  
Ron Driesen, Consumer-Operated Center Director  
Carol Allen, National Alliance on Mental Illness (NAMI)

I Introductions 10 minutes

II Purpose of the Committee—Nicole 10 minutes

- How we can help more clients work?
- Agency's recent efforts to implement recovery philosophy
- Employment rate at mental health center is 12% even though many clients want to work.

III Vocational Rehabilitation Perspective—Chris 10 minutes

- People with mental illness comprise a high percentage of Vocational Rehabilitation clients
- Vocational Rehabilitation success rate with this group is relatively low—how can we improve that rate?

III IPS Supported Employment—Ron 30 minutes

- Evidence-based practice
- Description of the model—8 practice principles

IV Group Discussion 30 minutes

- Does this model sound like a good fit?
- Are there revenue sources for at least two employment specialist positions?
- How would we learn more?
- Next steps

Meeting schedule: Once each month

## Early Implementation IPS Supported Employment Steering Committee

### Sample Meeting Agenda

#### Committee Members:

Juanita Arnett, IPS supported employment supervisor  
Carol Waters, employment specialist  
Gerald Net, IPS supported employment client  
Ed Jorgenson, IPS supported employment client  
Amy Anderson, mental health director  
Cleveland Baker, employer and family member  
Adam Sneed, family member  
Becky Adler, Vocational Rehabilitation supervisor  
Sandra Miller, Vocational Rehabilitation counselor

#### Agenda Items:

##### I Fidelity Report

- Initial fidelity review was conducted on July 1. Please see attached handouts.
  - Integration of rehabilitation with mental health services
    - What is “shared decision making”? How can we facilitate this?
  - Collaboration with Vocational Rehabilitation:
    - Can we begin meeting monthly? Where would we meet? Who would attend?
  - Individualized job search
    - Discussion of strategies to learn about more employers.
  - Ongoing work-based assessment
    - Group to discuss elimination of vocational evaluation program.

Meeting Schedule: Once a month

## **Mid-Implementation IPS Steering Committee**

### Meeting Agenda

#### Committee Members:

Jon Factor, IPS supervisor  
Liz Baker, clinical director, mental health center  
Ken Fish, quality assurance director, mental health center  
Trish Johnson, supervisor, Vocational Rehabilitation  
Pam Hartman, counselor, Vocational Rehabilitation  
Blanche Door, mental health board member  
Tom Leed, IPS consumer  
Nancy Otterman, IPS consumer  
Adam Morgan, National Alliance on Mental Illness (NAMI)  
George Smith, family member  
Craig Chester, Apple County Chamber of Commerce

#### I Fidelity Action Plan

- Group to review most recent additions to plan.

#### II Chamber of Commerce Newsletter

- Craig has offered to put an article about the IPS program in the chamber newsletter. Group to talk about key points for the article.

#### III Ongoing Education about IPS Supported Employment

- Jon and Liz have developed training for new case managers about IPS.

#### IV Promoting a Work Culture in the Mental Health Agency

- Nancy is willing to attend a case management meeting to talk about her experiences going back to work.
- Vocational Rehabilitation participation in mental health treatment team meetings?

Meeting Schedule: Every other month

## **Sustaining IPS Program Steering Committee**

### Sample Meeting Agenda

#### Participants:

Pat Greer, mental health agency, chief operating officer  
John Adkins, mental health agency, clinical director  
Loretta Walker, IPS supervisor  
Dale Rawlings, mental health agency, chief financial officer  
Sue Snyder, Vocational Rehabilitation supervisor  
Jim Johnson, National Alliance for Mental Illness  
Tony LeRose, family member  
Laura LeRose, family member  
Debra Bright, IPS client  
Janet Allerby, IPS client  
Nancy Jorgeson, IPS client  
Ed Goetz, IPS client  
Joe Escher, employment specialist

#### I Employment Specialists Caseloads

- Employment specialist caseloads are at 32 people which has a negative impact on outcomes
- Vocational Rehabilitation counselors, and case managers, would like to make more referrals
- Is there revenue to support another position?

#### II Agency Rate of Employment

- Agency is ready to begin measuring employment for all consumers with severe mental illness
- Discussion of how employment outcomes will be used in supervision
- Feedback from group

#### IV Promoting a Culture that Supports Work

- How can we recognize practitioners, administrators, and others who are champions for IPS and competitive employment?

#### V Review of Fidelity Action Plan

- Discussion of items with a rating of “4.” How can we improve?
- Loretta to begin drafting fidelity action plan from this discussion

Meeting schedule: Once each quarter