

Larry R. Matlack 10/07/98 08:21:50 AM

Record Type: Record

To: Cynthia A. Rice/OPD/EOP

cc: cecilia e. rouse/opd/eop, lisa m. brown/ovp @ ovp, lori schack/omb/eop, jeanne lambrew/opd/eop

Subject: Re: Nov. Meeting of Disability Task Force 

Thanks.

Yes, Becky's correct. We don't have a problem announcing Bridge in concept. Our guidance on this is that because of the Save Social Security First commitment we still have the same constraints on spending or new starts that are not offset we've faced before and don't want to get the Administration boxed in this early before everyone has had a chance to look at the whole picture and make decisions on priorities. For my part, I'm using the \$150 million preliminary estimate as an upper bound on this program to be sure I've put in the highest likely placeholder pending further discussions over what makes sense and can be easily and usefully launched.

Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE)

Introduction

On March 13, 1998, the President issued Executive Order No. 13078 entitled "Increasing Employment of Adults with Disabilities." The Executive Order directs federal agencies and departments to create a coordinated and aggressive national policy to accomplish that goal. As part of the effort to fulfill the President's mandate, the Departments of Labor, Education, Transportation, Commerce, Veterans Affairs, and Health and Human Services along with the Social Security Administration and the Small Business Administration are proposing the "Building Resources for Individuals with Disabilities to Gain Employment" ("BRIDGE") Program.

BRIDGE will help to increase the employment rate of adults with disabilities by fostering integration of employment-related services and support services to adults with disabilities among state and local disability systems *at the point of delivery*. Through competitive grants, BRIDGE will help people with disabilities access all of the services they need to find and keep employment through a single point of entry, rather than having to sort through a dizzying bureaucracy on their own. BRIDGE will also foster effective integration of service delivery so that different agencies with related missions will work together to achieve their common goal: employment of adults with disabilities.

Background

According to the 1998 Harris Survey of Americans with Disabilities, two-thirds of individuals with disabilities between the ages of 16 and 64 are not working. Only three in ten working-age adults with disabilities are employed full or part-time. Seventy-five percent of those non-employed adults with disabilities have indicated that they would prefer to be working (Harris Survey, 1998.) The vast majority of these individuals receive income support and other services through federal, state, and local programs like Temporary Assistance for Needy Families (TANF), Supplemental Security Income (SSI), Social Security Disability Income (SSDI), Medicaid (including Medicaid waiver programs), Medicare, mental health services, vocational rehabilitation, subsidized housing, and food stamps.

Even though legislation, technology, and changes in societal attitudes have improved the environment for employment, fewer than 1% per year of the eight million SSI and SSDI beneficiaries actually return to work and terminate benefits. In fact, over the past decade, the total number of SSI and SSDI disability beneficiaries has doubled and federal cash payments to these individuals have steadily increased to more than \$75 billion annually (SSA, 1998). The costs of related Medicaid coverage also continues to escalate. These figures will continue to increase dramatically with the increased incidence of disability in an aging population, and the

migration of many Temporary Assistance for Needy Families (TANF) recipients with disabilities from welfare to SSI/SSDI roles.

The Policy Problem

People with disabilities are a diverse population requiring a variety of services and supports to seek and retain employment. While a host of services and supports are currently provided by government, programs are dispersed among numerous departments and agencies. In addition, states and localities vary enormously in the structure, availability and effectiveness of their employment, health care, and other human services and support programs. The current fragmented approach to supplying these needed services and programs has rendered them less effective in assisting adults with disabilities in finding and maintaining competitive employment. In addition, while the programs are intended to accomplish the same outcome --- that is, helping adults with disabilities become employed --- they frequently do not work well together.

Lack of service coordination and integration results in negative consequences for employers and service providers, both public and private. Most important, they do not have ready access to skilled and effective workers with disabilities. But they also find their efforts frequently wasted. For example, in some states, job counselors do not have access to job listings from agencies that administer employment and training programs. In addition, many different service providers (a vocational rehabilitation counselor, an employment training specialist, a supported employment job developer, or a representative from Projects With Industry) may all be independently contacting the same employer to develop employment opportunities for persons with disabilities. This results in duplication of effort, confusion, and complications in the relationship between the service providers and employers; the very relationship that is often critical to employment success.

Current Efforts

Currently, the Social Security Administration, and the Departments of Labor, Education, and Health and Human Services have grant programs to develop and evaluate models of program coordination, service/systems integration and systems change to increase employment outcomes for people with disabilities at the state and local level. These agencies have published individual and joint grant announcements for competitive grant awards that have been made in FY 1998.

- The Social Security Administration, jointly funded with Health and Human Services/Substance Abuse and Mental Health Services Administration/Center for Mental Health Services, is administering the "Cooperative Agreements for State Projects which Increase Employment of Individuals with Disabilities Who Receive Public Support."

- The Department of Labor's Employment and Training Administration (DOL/ETA) administers a Disability Employment and Initiatives grant program that fosters linkages with the One-Stop Center system, interagency coordination of multiple service needs, and is designed to support the objectives of Executive Order No. 13078 to increase employment of people with disabilities.
- The Department of Education's Office of Special Education and Rehabilitative Services (OSERS)/ Rehabilitation Services Administration (RSA), jointly funded with DOL/ETA, is administering "Systems-Change Projects to Expand Employment Opportunities for Individuals With Mental or Physical Disabilities, or Both, Who Receive Public Support."

The BRIDGE Initiative

BRIDGE will build on the grant programs described above, with a greater emphasis on single-point-of-entry or "one-stop" service for adults with disabilities seeking to find and keep a job. Each adult with a disability --- each "customer" --- seeking the services needed to succeed in competitive employment should be able learn about, receive advice about, and gain access to all of the necessary services with the least effort possible, preferably with a single call or office visit. Thereafter, each of the services provided to our customer should be sufficiently integrated with all of the other services so that they collectively accomplish the common goal of long-term employment and permanent attachment to the workforce. BRIDGE exemplifies new workforce system infrastructure approaches at the state and local level that promote universal access through One-Stop Centers, integrated service delivery, enhanced customer information, and choice to improve employment potential and opportunity.

BRIDGE will emphasize the need to focus on the point of the delivery of services and the need to be flexible and adapt to state and local conditions. For this reason, state and local agencies will be given the greatest leeway possible to assemble and organize consortiums that best serve their populations. Grant proposals will be designed to enhance service delivery through the One-Stop Centers with expanded wrap-around counseling, provision of information that can maximize scarce resources and employment outcomes, and other approaches that address customer and community barriers to employment by integrated and coordinated service delivery.

BRIDGE would be linked to the existing grant programs in that grant competitions under BRIDGE would incorporate any lessons learned in the existing programs. Further, grantees under the existing programs would be allowed to apply for additional funds to expand their current efforts. Finally, all applicants would be required to identify and discuss the implications of their proposed efforts to grants in their state or localities under the existing programs.

Target Population

Consortia of agencies providing services to individuals with mental or physical disabilities, or both, who are participants in federal, state, and/or local public support programs (e.g., TANF, SSI, SSDI, Medicaid, Medicare, subsidized housing, and food stamps, etc.) will be eligible for grants under the BRIDGE program.

Eligible Applicants

Each applicant must be a consortium of state and/or local agencies that provide or could provide a range of supports and services to adults with disabilities which lead to finding and keeping employment. The agencies must have the legal authority to provide the services they propose. Consortia may include not-for-profit providers of employment, assistive technology, health and other related services to adults with disabilities.

Successful applicants would demonstrate that they have identified the means to integrate and coordinate the services provided across agencies and to remove barriers to employment for adults with disabilities. Successful applicants would also demonstrate that they consulted with diverse elements within the community of adults with disabilities in the planning, implementation, and evaluation of the project. Finally, successful applicants would demonstrate that they will match BRIDGE funds with appropriate federal, state, and/or local funds.

To be considered for a BRIDGE grant:

- Consortia must include the following five public agencies which must, in turn, contribute resources to the work of their consortia over the span of the grants:
 - Local and/or district offices of SSA
 - Medicaid/state medical assistance agency
 - Veterans Administration Regional Office/Vocational and Counseling
 - State Vocational Rehabilitation agency
 - Local Workforce Investment Board/One-Stop Centers

- Applications will be given substantial additional credit in the selection process if the consortium includes any of the following entities that demonstrate a commitment of resources to the work of the consortia:
 - State TANF agency
 - Independent Living Centers
 - State developmental disability agency
 - State mental retardation agency
 - State mental health agency
 - Vocational rehabilitation for the blind and deaf
 - State/local transportation agency, public transit authority,
metropolitan planning organization

- Applications will be given some additional credit in the selection process if the consortium includes the following entities as formal partners (e.g., through MOUs or other types of formal agreements):
 - Community colleges
 - Consumer organizations
 - Economic development agency
 - Education agency/boards of education
 - Labor organizations
 - Private non-profit service providers
 - Protection advocacy agency
 - Public housing authority
 - School-to-work agency
 - Small business administration office and/or small business development center

Finally, up to 5 percent of the grant amount would be reserved for rigorous evaluation. Each applicant would have to demonstrate an ability and willingness to cooperate in a meaningful fashion in an overall evaluation of their coordination and integration efforts.

Allowable Activities

Allowable activities include those needed to achieve program integration and improved coordination of existing local, state and federal programs in the delivery of services to adults with disabilities and their achievement of self-sustaining employment and economic independence. Allowable activities include:

- planning, development and implementation of cooperative agreements;
- establishing partnerships among entities to provide integrated income assistance, health and other benefits, job training and placement, and other employment-related services, such as transportation assistance;
- providing training amongst consortium partners and required partners under the Workforce Investment Act to increase knowledge and awareness of incentives, available services, and health care waiver provisions, and to promote equal opportunity for the effective participation of individuals with disabilities in the workforce investment system;
- comprehensive pre-service assistance, including counseling on benefits and incentives under the Social Security Act and information on the array of available services to individuals with disabilities that increase the ability to obtain and retain employment;

- developing and implementing procedures that promote a “single point of entry” or “one-stop service delivery” such as common intake, coordination of customer data bases, customer service hotlines, and access to information resources through technology or staff assistance;
- establishing linkages of consortium partners with services provided through One-Stop Center system, under the Workforce Investment Act of 1998, to ensure comprehensive and coordinated delivery of employment-related services to individuals with disabilities;
- establishing linkages with other providers of services that people with disabilities may need to find and keep gainful employment, including local public agencies, not-for-profit service providers, community based organizations, and educational institutions;
- implementing information technology linkages to One-Stop Center infrastructure providing labor market, skill requirements, job listings and available training providers. Available funding for information technology infrastructure development and implementation will be limited to 20%, with any additional support funded by respective consortium partners; and
- evaluation of program or activities funded by BRIDGE grants.

With the exception of pre-service assistance, BRIDGE funds can not be used for direct services and direct services must be provided by the local, state and/or federally funded program available for that purpose. The intent of BRIDGE is to make these services readily accessible and comprehensible to the consumer.

Availability of Funding

BRIDGE grants would be awarded from a national account of \$150 million in FY 2000. Grants would last for three years with funding in FY 2001 and FY 2002 contingent upon subsequent appropriations. Current funding for traditional disability employment programs would not be supplanted by this initiative.

Expected Outcomes

These grants will produce a diverse array of integrated and coordinated service systems in states and local areas across the country that will effect the following. Some of the expected outcomes will include the following:

Adults with disabilities will:

- enter into gainful employment within a competitive work environment at a higher rate of pay than they receive currently;

- more easily and rapidly access a wider and more diverse array of employment services resulting in efficient and rapid job placement that will improve job skills, job opportunities, job placement, and job retention for adults with disabilities;
- be more satisfied with employment and related support services;
- have more input concerning their life goals and career plans;
- have more choices with respect to employment and career decisions;
- be more readily accommodated within the work force;
- have a better understanding of work incentive provisions; and
- report that their quality of life has improved.

State and local service delivery systems will:

- be less fragmented, have improved communication across systems, and be more efficient by decreasing duplication of services;
- be more user friendly and customer oriented;
- be more cost-effective than services provided in less integrated delivery service systems;
- systematically decrease barriers to employment of adults with disabilities at state and local levels (e.g. lack of: transportation, health care/insurance, education, workforce training, housing, assistive technology, civil rights, on-site and off-site job accommodations and long-term follow-along supports);
- increase the use of Medicaid waivers and individual waivers of SSA eligibility and income requirements; and
- realize substantial cost savings in terms of reducing the costs of public benefit programs.

Attachment: Proposed Legislative Language for Allowable Activities

SEC. __. AUTHORIZED BRIDGE PARTNERSHIP ACTIVITIES.--

(a) Systems Change Grants.-- Funds made available from appropriations for carrying out this Act may be used to provide assistance pursuant to grants or contracts with eligible entities in each State for--

(1) the establishment of partnerships utilizing existing local, State, and Federal resources for the purpose of achieving the coordinated provision of integrated income assistance, health and other benefits, job training and placement, and other employment-related services for adults with disabilities;

(2) the planning, development, and implementation of cooperative agreements among consortium members establishing such new partnerships;

(3) making arrangements to link such services with local one-stop delivery systems under the Workforce Investment Act of 1998 in a manner that comprehensively supports coordinated delivery of employment-related services to individuals with disabilities;

(4) the provision of training and technical assistance to consortium partners under this Act and to all components of the Statewide workforce investment system under the Workforce Investment Act of 1998 in order--

(A) to increase awareness of the availability of and the eligibility requirements for employment-related benefits, services, and training for adults with disabilities; and

(B) to promote equal opportunity for the effective participation of individuals with disabilities in workforce investment activities in the State through improved understanding and knowledge of program accessibility needs and requirements;

(5) the development and implementation of procedures designed to enhance the provision of services for adults with disabilities through such means as common intake, resource information and assistance (including assistance in resume preparation and career development, and information on employment-related services, programs, and benefits), the development of customer databases and customer service hotlines, and appropriate employment-related counseling and referrals, utilizing single point-of-entry systems involving appropriate electronic and staff assistance;

(6) the development of information systems that link consortium partners with the Statewide workforce investment system and with national, State, and local labor market information resources, including employment statistics and information on job vacancies;

(7) the establishment of linkages with other providers of services that adults with disabilities may need in order to find and keep gainful employment, including such providers as local public agencies, not-for-profit service providers, community-based organizations, and educational institutions;

(8) the establishment of arrangements for the provision of comprehensive pre-service assistance for individuals with disabilities, including counseling on benefits and incentives under the Social Security Act, and information on the array of available services, including transportation assistance and subsidies; and

(9) evaluation of programs or activities funded under this Act.

(b) IMPROVED SERVICES TO BETTER SERVE TARGETED POPULATIONS.--

In order to better serve targeted sub-populations among adults with disabilities, funds made available from appropriations for carrying out this Act may be used to provide assistance pursuant to grants or contracts--

(1) to enable a State's publicly-funded entities serving specific sub-populations of adults with disabilities (including individuals who are blind or deaf, or have psychiatric or developmental disabilities, and others) to provide training and technical assistance to consortium partners, relating to the specific needs and barriers faced by their clients;

(2) to identify and implement systems changes that address unique barriers to employment for targeted sub-populations, including--

(A) linkages and improved access to transportation for those with mobility impairments;

(B) resolution of housing issues facing those experiencing de-institutionalization or loss of public housing support; and

(C) other barriers to entry into employment and job retention; and

(3) to identify and implement service delivery approaches for targeted sub-populations that bridge or cut across the relevant State systems, in order to address specific barriers confronting such sub-populations.

(c) INFORMATION TECHNOLOGY.-- Not to exceed 20 percent of the amounts available for grants or contracts under this section may be used for the acquisition of computer hardware and software to facilitate linking or consolidating information or services provided by existing State, local, and Federal providers.

DRAFT October 7, 1998

Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE)

Introduction

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Successful applicants would demonstrate that they have identified the means to integrate and coordinate the services provided across agencies and to remove barriers to employment for adults with disabilities. Successful applicants would also demonstrate that they consulted with diverse elements within the community of adults with disabilities in the planning, implementation, and evaluation of the project. Finally, successful applicants would demonstrate that they will match BRIDGE funds with appropriate federal, state, and/or local funds.

To be considered for a BRIDGE grant:

- Consortia must include the following five public agencies which must, in turn, contribute resources to the work of their consortia over the span of the grants:

Local and/or district offices of SSA
Medicaid/state medical assistance agency
Veterans Administration Regional Office/Vocational and Counseling
State Vocational Rehabilitation agency
Local Workforce Investment Board/One-Stop Centers

- Applications will be given substantial additional credit in the selection process if the consortium includes any of the following entities that demonstrate a commitment of resources to the work of the consortia:

Independent Living Centers
State developmental disability agency
State mental retardation agency
State mental health agency
State TANF agency
Vocational rehabilitation for the blind and deaf

State/local transportation agency/public transit authorities, metropolitan planning organization

- Applications will be given some additional credit in the selection process if the consortium includes the following entities as formal partners (e.g., through MOUs or other types of formal agreements):

Community colleges

Consumer organizations

Economic development agency

Education agency/boards of education

Labor organizations

Private non-profit service providers

Protection advocacy agency

Public housing authority

School-to-work agency

Small business administration district office and/or small business development center

Finally, up to 5 percent of the grant amount would be reserved for rigorous evaluation. Each applicant would have to demonstrate an ability and willingness to cooperate in a meaningful fashion in an overall evaluation of their coordination and integration efforts.

Allowable Activities

Allowable activities include those needed to achieve program integration and improved coordination of existing local, state and federal programs in the delivery of services to adults with disabilities and their achievement of self-sustaining employment and economic independence. Allowable activities include:

- planning, development and implementation of cooperative agreements;
- establishing partnerships among entities to provide integrated income assistance, health and other benefits, job training and placement, and other employment-related services, such as transportation assistance;
- providing training amongst consortium partners and required partners under the Workforce Investment Act to increase knowledge and awareness of incentives, available services, and health care waiver provisions, and to promote equal opportunity for the effective participation of individuals with disabilities in the workforce investment system;
- comprehensive pre-service assistance, including counseling on benefits and incentives under the Social Security Act and information on the array of available services to individuals with disabilities that increase the ability to obtain and retain employment;

- developing and implementing procedures that promote a “single point of entry” or “one-stop service delivery” such as common intake, coordination of customer data bases, customer service hotlines, and access to information resources through technology or staff assistance;
- establishing linkages of consortium partners with services provided through One-Stop Center system, under the Workforce Investment Act of 1998, to ensure comprehensive and coordinated delivery of employment-related services to individuals with disabilities;
- establishing linkages with other providers of services that people with disabilities may need to find and keep gainful employment, including local public agencies, not-for-profit service providers, community based organizations, and educational institutions;
- implementing information technology linkages to One-Stop Center infrastructure providing labor market, skill requirements, job listings and available training providers. Available funding for information technology infrastructure development and implementation will be limited to 20%, with any additional support funded by respective consortium partners; and
- evaluation of program or activities funded by BRIDGE grants.

With the exception of pre-service assistance, BRIDGE funds can not be used for direct services and direct services must be provided by the local, state and/or federally funded program available for that purpose. The intent of BRIDGE is to make these services readily accessible and comprehensible to the consumer.

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- be more satisfied with employment and related support services;
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- be less fragmented, have improved communication across systems, and be more efficient by decreasing duplication of services;
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- be more cost-effective than services provided in less integrated delivery service systems;
- systematically decrease barriers to employment of adults with disabilities at state and local levels (e.g. lack of: transportation, health care/insurance, education, workforce training, housing, assistive technology, civil rights, on-site and off-site job accommodations and long-term follow-along supports);
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Attachment: Proposed Legislative Language for Allowable Activities

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(a) Systems Change Grants.-- Funds made available from appropriations for carrying out this Act may be used to provide assistance pursuant to grants or contracts with eligible entities in each State for--

(1) the establishment of partnerships utilizing existing local, State, and Federal resources for the purpose of achieving the coordinated provision of integrated income assistance, health and other benefits, job training and placement, and other employment-related services for adults with disabilities;

(2) the planning, development, and implementation of cooperative agreements among consortium members establishing such new partnerships;

(3) making arrangements to link such services with local one-stop delivery systems under the Workforce Investment Act of 1998 in a manner that comprehensively supports coordinated delivery of employment-related services to individuals with disabilities;

(4) the provision of training and technical assistance to consortium partners under this Act and to all components of the Statewide workforce investment system under the Workforce Investment Act of 1998 in order--

(A) to increase awareness of the availability of and the eligibility requirements for employment-related benefits, services, and training for adults with disabilities; and

(B) to promote equal opportunity for the effective participation of individuals with disabilities in workforce investment activities in the State through improved understanding and knowledge of program accessibility needs and requirements;

(5) the development and implementation of procedures designed to enhance the provision of services for adults with disabilities through such means as common intake, resource information and assistance (including assistance in resume preparation and career development, and information on employment-related services, programs, and benefits), the development of customer databases and customer service hotlines, and appropriate employment-related counseling and referrals, utilizing single point-of-entry systems involving appropriate electronic and staff assistance;

(6) the development of information systems that link consortium partners with the Statewide workforce investment system and with national, State, and local labor market information resources, including employment statistics and information on job vacancies;

(7) the establishment of linkages with other providers of services that adults with disabilities may need in order to find and keep gainful employment, including such providers as local public agencies, not-for-profit service providers, community-based organizations, and educational institutions;

(8) the establishment of arrangements for the provision of comprehensive pre-service assistance for individuals with disabilities, including counseling on benefits and incentives under the Social Security Act, and information on the array of available services, including transportation assistance and subsidies; and

(9) evaluation of programs or activities funded under this Act.

(b) IMPROVED SERVICES TO BETTER SERVE TARGETED POPULATIONS. --

In order to better serve targeted sub-populations among adults with disabilities, funds made available from appropriations for carrying out this Act may be used to provide assistance pursuant to grants or contracts--

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Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE)

Introduction

On March 13, 1998, the President issued Executive Order No. 13078 entitled "Increasing Employment of Adults with Disabilities." The Executive Order directs federal agencies and departments to create a coordinated and aggressive national policy to accomplish that goal. As part of the effort to fulfill the President's mandate, the Departments of Labor, Education, Transportation, Commerce, Veterans Affairs, and Health and Human Services along with the Social Security Administration and the Small Business Administration are proposing the "Building Resources for Individuals with Disabilities to Gain Employment" ("BRIDGE") Program.

BRIDGE will help to increase the employment rate of adults with disabilities by fostering integration of employment-related services and support services to adults with disabilities among state and local disability systems *at the point of delivery*. Through competitive grants, BRIDGE will help people with disabilities access all of the services they need to find and keep employment through a single point of entry, rather than having to sort through a dizzying bureaucracy on their own. BRIDGE will also foster effective integration of service delivery so that different agencies with related missions will work together to achieve their common goal: employment of adults with disabilities.

Background

According to the 1998 Harris Survey of Americans with Disabilities, two-thirds of individuals with disabilities between the ages of 16 and 64 are not working. Only three in ten working-age adults with disabilities are employed full or part-time. Seventy-five percent of those non-employed adults with disabilities have indicated that they would prefer to be working (Harris Survey, 1998.) The vast majority of these individuals receive income support and other services through federal, state, and local programs like Temporary Aid to Needy Families (TANF), Supplemental Security Income (SSI), Social Security Disability Income (SSDI), Medicaid (including Medicaid waiver programs), Medicare, mental health services, vocational rehabilitation, subsidized housing, and food stamps.

Even though legislation, technology, and changes in societal attitudes have improved the environment for employment, fewer than 1% per year of the eight million SSI and SSDI beneficiaries actually return to work and terminate benefits. In fact, over the past decade, the total number of SSI and SSDI disability beneficiaries has doubled and federal cash payments to these individuals have steadily increased to more than \$75 billion annually (SSA, 1998). The costs of related Medicaid coverage also continues to escalate. These figures will continue to increase dramatically with the increased incidence of disability in an aging population, and the

migration of many Temporary Aid to Needy Families (TANF) recipients with disabilities from welfare to SSI/SSDI roles.

The Policy Problem

People with disabilities are a diverse population requiring a variety of services and supports to find and keep seek or retain employment. While a host of services and supports are currently provided by government, programs are dispersed among numerous departments and agencies. In addition, states and localities vary enormously in the structure, availability and effectiveness of their employment, health care, and other human services and support programs. The current fragmented approach to supplying these needed services and programs has rendered them less effective in assisting adults with disabilities in finding and maintaining competitive employment. In addition, while the programs are intended to accomplish the same outcome --- that is, employment for adults with disabilities --- they frequently do not work well together.

For example, adults with disabilities experience difficulty obtaining reliable information about employment opportunities and services, various work incentives, the myriad of state health care benefits under Medicaid, and the impact of work on their federal benefits status for SSI, SSDI, Medicaid and Medicare.

Lack of service coordination and integration results in negative consequences for employers and service providers, both public and private. Most important, they do not have ready access to skilled and effective workers with disabilities. But they also find their effort frequently wasted. For example, in some states, job counselors do not have access to job listings from agencies that administer employment and training programs. In addition, many different service providers (a vocational rehabilitation counselor, an employment training specialist, a supported employment job developer, or a representative from Projects With Industry) may all be independently contacting the same employer to develop employment opportunities for persons with disabilities. This results in duplication of effort, confusion, and complications in the relationship between the service providers and employer; the very relationship that is often critical to employment success.

Current Efforts

Currently, the Social Security Administration, and the Departments of Labor, Education, and Health and Human Services have grants programs to develop and evaluate models of program coordination, service/systems integration and systems change to increase employment outcomes for people with disabilities at the state and local level. These agencies have published individual and joint grant announcements for competitive grant awards that have been made in FY 1998.

- The Social Security Administration, jointly funded with Health and Human Services/Substance Abuse and Mental Health Services Administration/Center for Mental Health Services, is administering the “Cooperative Agreements for State Projects which Increase Employment of Individuals with Disabilities Who Receive Public Support.”
- The Department of Labor’s Employment and Training Administration (DOL/ETA) administers a Disability Employment and Initiatives grant program fostering linkages with One-Stop Center system, interagency coordination of multiple service needs, and designed to support the objectives of Executive Order No. 13078 to increase employment of people with disabilities.
- The Department of Education’s Office of Special Education and Rehabilitative Services (OSERS)/ Rehabilitation Services Administration (RSA), jointly funded with DOL/ETA, is administering “Systems-Change Projects to Expand Employment Opportunities for Individuals With Mental or Physical Disabilities, or Both, Who Receive Public Support.”

The BRIDGE Initiative

BRIDGE will build on the grants programs described above, with a greater emphasis on single-point-of-entry or “one-stop” service for adults with disabilities seeking to find and keep a job. Each adult with a disability --- each “customer” --- seeking the services needed to succeed in competitive employment should be able learn about, receive advice about, and gain access to all of the necessary services with the least effort possible, preferably with a single call or office visit. Thereafter, each of the services provided to our customer should be sufficiently integrated with all of the other services so that they collectively accomplish the common goal of long-term employment and permanent attachment to the workforce. BRIDGE exemplifies new workforce system infrastructure approaches at the state and local level that promote universal access through One-Stop Centers, integrated service delivery, enhanced customer information, and choice to improve employment potential and opportunity.

BRIDGE will emphasize the need to focus on the point of the delivery of services and the need to be flexible and adapt to state and local conditions. For this reason, state and local agencies will be given the greatest leeway possible to assemble and organize consortiums that best serve their populations. Grant proposals will be designed to enhance service delivery through the One-Stop Centers with expanded wrap-around counseling, provision of information that can maximize scarce resources and employment outcomes, and other approaches that address customer and community barriers to employment by integrated and coordinated service delivery.

BRIDGE would be linked to the existing grant programs in that grant competitions under BRIDGE would incorporate any lessons learned in the existing programs. Further, grantees under the existing programs would be allowed to apply for additional funds to expand their

current efforts. Finally, all applicants would be required to identify and discuss the implications of their proposed efforts to grants in their state or localities under the existing programs.

Target Population

Consortia of agencies providing services to individuals with mental or physical disabilities, or both, who are participants in federal, state, and/or local public support programs (e.g., TANF, SSI, SSDI, Medicaid, Medicare, subsidized housing, and food stamps, etc.) will be eligible for grants under the BRIDGE program.

Eligible Applicants

Each applicant must be a consortium of state and/or local agencies that provide or could provide a range of supports and services to adults with disabilities which lead to finding and keeping employment. The agencies must have the legal authority to provide the services they propose. Consortia may include not-for-profit providers of employment, assistive technology, health and other related services to adults with disabilities.

Successful applicants would demonstrate that they have identified the means to integrate and coordinate the services provided across agencies and to remove barriers to employment for adults with disabilities. Successful applicants would also demonstrate that they consulted with diverse elements within the community of adults with disabilities in the planning, implementation, and evaluation of the project. Finally, successful applicants would demonstrate that they will match BRIDGE funds with appropriate federal, state, and/or local funds.

To be considered for a BRIDGE grant:

- **Consortia must include the following five public agencies which must, in turn, contribute resources to the work of their consortia over the span of the grants:**

Local and/or district offices of SSA

Medicaid/state medical assistance agency

Veterans Administration Regional Office/Vocational and Counseling

State Vocational Rehabilitation agency

Local Workforce Investment Board/One-Stop Centers

- **Applications will be given substantial additional credit in the selection process if the consortium includes any of the following entities that demonstrate a commitment of resources to the work of the consortia:**

Independent Living Centers

State developmental disability agency

State mental retardation agency

State mental health agency

State TANF agency

Vocational rehabilitation for the blind and deaf

State/local transportation agency/public transit authorities, metropolitan planning organization

- Applications will be given some additional credit in the selection process if the consortium includes the following entities as formal partners (e.g., through MOU's or other types of formal agreements):

Community colleges

Consumer organizations

Economic development agency

Education agency/boards of education

Labor organizations

Private non-profit service providers

Protection advocacy agency

Public housing authority

School-to-work agency

Small business administration district office and/or small business development center

Finally, up to 5 percent of the grant amount would be reserved for rigorous evaluation. Each applicant would have to demonstrate an ability and willingness to cooperate in a meaningful fashion in an overall evaluation of their coordination and integration efforts.

Allowable Activities

Allowable activities include those needed to achieve program integration and improved coordination of existing local, state and federal programs in the delivery of services to adults with disabilities and their achievement of self-sustaining employment and economic independence. Allowable activities include:

- planning, development and implementation of cooperative agreements;
- establishing partnerships among entities to provide integrated income assistance, health and other benefits, job training and placement, and other employment-related services, such as transportation assistance;
- providing training amongst consortium partners and required partners under the Workforce Investment Act to increase knowledge and awareness of incentives, available services, and health care waiver provisions, and to promote equal opportunity for the effective participation of individuals with disabilities in the workforce investment system;

- comprehensive pre-service assistance, including counseling on benefits and incentives under the Social Security Act and information on the array of available services to individuals with disabilities that increase the ability to obtain and retain employment;
- developing and implementing procedures that promote a "single point of entry" or "one-stop service delivery" such as common intake, coordination of customer data bases, customer service hotlines, and access to information resources through technology or staff assistance;
- establishing linkages of consortium partners with services provided through One-Stop Center system, under the Workforce Investment Act of 1998, to ensure comprehensive and coordinated delivery of employment-related services to individuals with disabilities;
- establishing linkages with other providers of services that people with disabilities may need to find and keep gainful employment, including local public agencies, not-for-profit service providers, community based organizations, and educational institutions;
- implementing information technology linkages to One-Stop Center infrastructure providing labor market, skill requirements, job listings and available training providers. Available funding for information technology infrastructure development and implementation will be limited to 20%, with any additional support funded by respective consortium partners; and
- evaluation of program or activities funded by BRIDGE grants.

With the exception of pre-service assistance, BRIDGE funds can not be used for direct services and direct services must be provided by the local, state and/or federally funded program available for that purpose. The intent of BRIDGE is to make these services readily accessible and comprehensible to the consumer.

Availability of Funding

BRIDGE grants would be awarded from a national account of \$150 million in FY 2000. Grants would last for three years with funding in FY 2001 and FY 2002 contingent upon subsequent appropriations. Current funding for traditional disability employment programs would not be supplanted by this initiative.

Expected Outcomes

These grants will produce a diverse array of integrated and coordinated service systems in states and local areas across the country that will effect the following. Some of the expected outcomes will include the following:

Adults with disabilities will:

- enter into gainful employment within a competitive work environment at a higher rate of pay than they receive currently;
- more easily and rapidly access a wider and more diverse array of employment services resulting in efficient and rapid job placement that will improve job skills, job opportunities, job placement, and job retention for adults with disabilities;
- be more satisfied with employment and related support services;
- have more input concerning their life goals and career plans;
- have more choices with respect to employment and career decisions;
- be more readily accommodated within the work force;
- have a better understanding of work incentive provisions; and
- report that their quality of life has improved.

State and local service delivery systems will:

- be less fragmented, have improved communication across systems, and be more efficient by decreasing duplication of services;
- be more user friendly and customer oriented;
- be more cost-effective than services provided in less integrated delivery service systems;
- systematically decrease barriers to employment of adults with disabilities at state and local levels (e.g. lack of: transportation, health care/insurance, education, workforce training, housing, assistive technology, civil rights, on-site and off-site job accommodations and long-term follow-along supports);
- increase the use of Medicaid waivers and individual waivers of SSA eligibility and income requirements; and
- realize substantial cost savings in terms of reducing the costs of public benefit programs.

SEC. . AUTHORIZED BRIDGE PARTNERSHIP ACTIVITIES.--

(a) Systems Change Grants.-- Funds made available from appropriations for carrying out this Act may be used to provide assistance pursuant to grants or contracts with eligible entities in each State for--

(1) the establishment of partnerships utilizing existing local, State, and Federal resources for the purpose of achieving the coordinated provision of integrated income assistance, health and other benefits, job training and placement, and other employment-related services for adults with disabilities;

(2) the planning, development, and implementation of cooperative agreements among consortium members establishing such new partnerships;

(3) making arrangements to link such services with local one-stop delivery systems under the Workforce Investment Act of 1998 in a manner that comprehensively supports coordinated delivery of employment-related services to individuals with disabilities;

(4) the provision of training and technical assistance to consortium partners under this Act and to all components of the Statewide workforce investment system under the Workforce Investment Act of 1998 in order--

(A) to increase awareness of the availability of and the eligibility requirements for employment-related benefits, services, and training for adults with disabilities; and

(B) to promote equal opportunity for the effective participation of individuals with disabilities in workforce investment activities in the State through improved understanding and knowledge of program accessibility needs and requirements;

(5) the development and implementation of procedures designed to enhance the provision of services for adults with disabilities through such means as common intake, resource information and assistance (including assistance in resume preparation and career development, and information on employment-related services, programs, and benefits), the development of customer databases and customer service hotlines, and appropriate employment-related counseling and referrals, utilizing single point-of-entry systems involving appropriate electronic and staff assistance;

(6) the development of information systems that link consortium partners with the Statewide workforce investment system and with national, State, and local labor market information resources, including employment statistics and information on job vacancies;

(7) the establishment of linkages with other providers of services that adults with disabilities may need in order to find and keep gainful employment, including such providers as local public agencies, not-for-profit service providers, community-based organizations, and educational institutions;

(8) the establishment of arrangements for the provision of comprehensive pre-service assistance for individuals with disabilities, including counseling on benefits and incentives under the Social Security Act, and information on the array of available services, including transportation assistance and subsidies; and

(9) evaluation of programs or activities funded under this Act.

(b) IMPROVED SERVICES TO BETTER SERVE TARGETED POPULATIONS.--

In order to better serve targeted sub-populations among adults with disabilities, funds made available from appropriations for carrying out this Act may be used to provide assistance pursuant to grants or contracts--

(1) to enable a State's publicly-funded entities serving specific sub-populations of adults with disabilities (including individuals who are blind or deaf, or have psychiatric or developmental disabilities, and others) to provide training and technical assistance to consortium partners, relating to the specific needs and barriers faced by their clients;

(2) to identify and implement systems changes that address unique barriers to employment for targeted sub-populations, including--

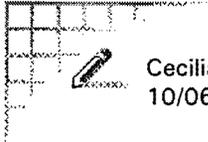
(A) linkages and improved access to transportation for those with mobility impairments;

(B) resolution of housing issues facing those experiencing de-institutionalization or loss of public housing support; and

(C) other barriers to entry into employment and job retention; and

(3) to identify and implement service delivery approaches for targeted sub-populations that bridge or cut across the relevant State systems, in order to address specific barriers confronting such sub-populations.

(c) INFORMATION TECHNOLOGY.-- Not to exceed 20 percent of the amounts available for grants or contracts under this section may be used for the acquisition of computer hardware and software to facilitate linking or consolidating information or services provided by existing State, local, and Federal providers.



Cecilia E. Rouse
10/06/98 06:32:43 PM.

Record Type: Record

To: Cynthia A. Rice/OPD/EOP
cc:
Subject: FW:

A draft of the BRIDGE memo. I would like to get comments back to Becky tomorrow since I'll be out Thurs and Fri and the memo should be circulated before the end of the week.

-- ceci

----- Forwarded by Cecilia E. Rouse/OPD/EOP on 10/06/98 06:31 PM -----



Ogle Becky <ogle-becky@dol.gov>
10/06/98 06:23:01 PM

Record Type: Record

To: Cecilia E. Rouse/OPD/EOP
cc:
Subject: FW:

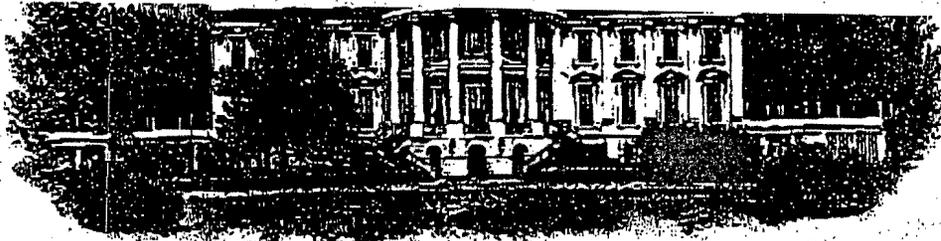


<WP Attachment Enclosed>

I don't have Cynthia's email, would you mind doing me a favor and making sure she gets a copy. The rest of the materials for Cynthia are coming via courier tomorrow. Sorry for the delay, but the conference just ended for the day. Thanks.



- BRIDGE2.DFC



THE WHITE HOUSE

**CECILIA ROUSE
SPECIAL ASSISTANT TO PRESIDENT
NATIONAL ECONOMIC COUNCIL
(202) 456-5359 (Tel.)
(202) 456-2223 (Fax)**

TO: See Distribution List

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FAX: _____

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PAGES TO FOLLOW: 1

COMMENTS: _____

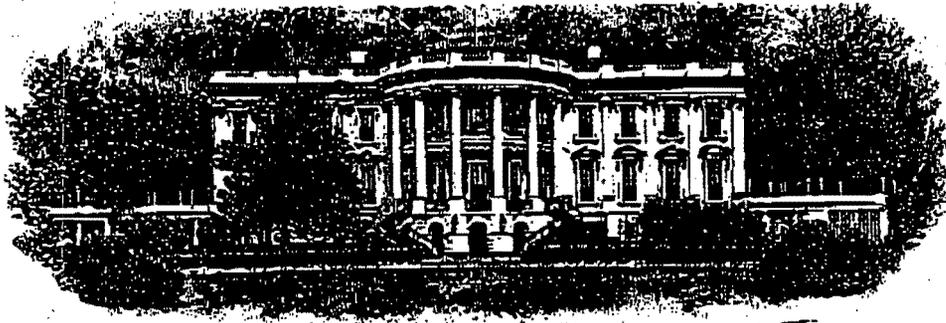
NEW CHANGE!

The next BRIDGE Program meeting will now take place on Tuesday, October 13th at 2:00 pm in room 239 OEOB. There will not be another meeting before this date. This will be a staff level meeting and please come prepared to make decisions as we will be wrapping up. Thank you.

Call Sonyia at 456-5351 if fax is incomplete.

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Sally Richardson	410-786-0025



THE WHITE HOUSE

CECILIA ROUSE
SPECIAL ASSISTANT TO PRESIDENT
NATIONAL ECONOMIC COUNCIL
(202) 456-5359 (Tel.)
(202) 456-2223 (Fax)

TO: See Distribution List

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DATE:

PAGES TO FOLLOW: 1

COMMENTS:

CHANGE!

The BRIDGE Program meeting will now take place on Tuesday, October 6th at 2:00 pm in room 239 OEOB. Not this Thursday, October 1st. Sonyia will update the Clearance List. Thank you.

Call Sonyia at 456-5351 if fax is incomplete.

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Sonya Matthews 09/14/98 08:30:59 AM

Record Type: Record

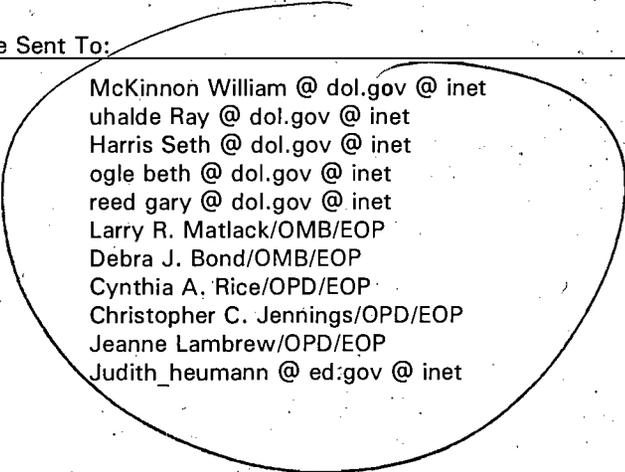
To: See the distribution list at the bottom of this message

cc: Cecilia E. Rouse/OPD/EOP

Subject: BRIDGE Program

There will be another meeting to discuss the above subject on Wednesday, September 16th at 2:00 pm room 239 OEOB. I will update all clearances. Please e-mail reply your attendance or call me on 456-5351. Thank you.

Message Sent To:



McKinnon William @ dol.gov @ inet
uhalde Ray @ dol.gov @ inet
Harris Seth @ dol.gov @ inet
ogle beth @ dol.gov @ inet
reed gary @ dol.gov @ inet
Larry R. Matlack/OMB/EOP
Debra J. Bond/OMB/EOP
Cynthia A. Rice/OPD/EOP
Christopher C. Jennings/OPD/EOP
Jeanne Lambrew/OPD/EOP
Judith_heumann @ ed.gov @ inet

C O V E R**FAX****S H E E T**

To: See attached list
Fax #: See attached list
Subject: BRIDGE Program
Date: 9/23/98
Pages: 8

COMMENTS:

Attached are two items:

The first document is the criteria for membership in the consortium. We were asked to list all of the possible agencies.

The second document is a redraft of the background paper. Bill has incorporated our collective decisions on targeting population into this document and the outstanding policy issues. The new sections of the document are highlighted.

From the desk of...

Seth Harris
Counselor to the Secretary
U.S. Department of Labor
200 Constitution Avenue, NW
Washington, DC 20210

(202) 219-8271
Fax: (202) 219-4902

September 23, 1998

The Bridge Program: Options for Defining the Consortium

- In the September 18, 1998 meeting, the NEC/DPC working group on the BRIDGE program generally agreed to Option #2B for defining membership in the consortium --- that is, a fixed core group of mandatory agencies with selection criteria encouraging the involvement of other agencies or entities.
- The group agreed that the four agencies identified in Option #2B as mandatory --- the WIB/PIC, VR, the local and/or district offices of SSA, and the Medicaid and state medical assistance agency --- should be the minimum core of mandatory entities
- The assignment was to make a list of all the agencies that might be in the consortium, so that the group can consider adding additional agencies to the mandatory core and/or giving different agencies higher and lower levels of priority within the selection criteria depending on their relative importance.

Listing of Agencies*Mandatory Core*

Workforce Investment Board/Private Industry Council
 Vocational Rehabilitation
 local and/or district offices of SSA
 Medicaid and state medical assistance agency

[TANF]

Added Either to Mandatory Core or Through Selection Criteria

state developmental disability agency
 state mental retardation agency
 state mental health agency
 state voc rehab for the blind and deaf
 state TANF agency
 state transportation agency
 state school-to-work agency
 state protection and advocacy agency
 Small Business Administration district office and/or small business development center
 Veterans Administration Regional Office -- voc rehab and counseling
 independent living centers
 local boards of education
 local community colleges
 local development agency
 local or regional transit authority and/or metropolitan planning organization
 local public housing authority
 private non-profit service providers
 labor organizations

State Dept of Education

① Relevant to selection
 - more points -
 if agree to commit
 resources

② Take into account
 if MODs have
 been entered into

DRAFT September 23, 1998

Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE)

Introduction

On March 13, 1998, the President issued Executive Order No. 13078 entitled "Increasing Employment of Adults with Disabilities" to increase the employment of adults with disabilities. The Executive Order directed federal agencies and departments to create a coordinated and aggressive national policy to accomplish that goal. As part of the effort to fulfill the President's mandate, the Departments of Labor, Education, Transportation, Commerce, and Health and Human Services along with the Social Security Administration, Small Business Administration, and Veterans Affairs, are propose the "Building Resources for Individuals with Disabilities to Gain Employment" ("BRIDGE") Program.

BRIDGE will help to increase the employment rate of adults with disabilities by fostering integration of employment-related services and support services to adults with disabilities among state and local disability systems *at the point of delivery*. Through competitive grants, BRIDGE will help people with disabilities access all of the services they need to find and keep employment through a single point of entry, rather than having to sort through a dizzying bureaucracy on their own. BRIDGE will also foster effective integration of service delivery that will continue well beyond the life of the grants.

Background

According to the 1998 Harris Survey of Americans with Disabilities, two-thirds of individuals with disabilities between the ages of 16 and 64 are not working. Only three in ten working-age adults with disabilities are employed full or part-time. Seventy-five percent of those non-employed adults with disabilities have indicated that they would prefer to be working (Harris Survey, 1998.) The vast majority of these individuals receive income support and other services through federal, state, and local programs like Temporary Aid to Needy Families (TANF), Supplemental Security Income (SSI), Social Security Disability Income (SSDI), Medicaid (including Medicaid waiver programs), Medicare, mental health services, vocational rehabilitation, subsidized housing, and food stamps.

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For example, adults with disabilities experience difficulty obtaining reliable information about employment opportunities and services, various work incentives, the myriad of state health care benefits under Medicaid, and the impact of work on their federal benefits status for SSI, SSDI, Medicaid and Medicare.

Lack of service coordination and integration results in negative consequences for employers and service providers, both public and private. Most important, they do not have ready access to skilled and effective workers with disabilities. But they also find their effort frequently wasted. For example, in some states, job counselors do not have access to job listings from agencies that administer employment and training programs. In addition, many different service providers (a vocational rehabilitation counselor, an employment training specialist, a supported employment job developer, or a representative from Projects With Industry) may all be independently contacting the same employer to develop employment opportunities for persons with disabilities. This results in duplication of effort, confusion, and complications in the relationship between the service providers and employer; the very relationship that is often critical to employment success.

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- The Department of Labor's Employment and Training Administration (DOL/ETA) administers a Disability Employment and Initiative grant program designed to support the objectives of Executive Order No. 13078
- The Department of Education's Office of Special Education and Rehabilitative Services (OSERS)/ Rehabilitation Services Administration (RSA) is administering "Systems-Change Projects to Expand Employment Opportunities for Individuals With Mental or Physical Disabilities, or Both, Who Receive Public Support."

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BRIDGE will build on the grants programs described above, with a greater emphasis on single-point-of-entry or "one-stop" service for adults with disabilities seeking to find and keep a job. Each adult with a disability --- each "customer" --- seeking the services needed to succeed in competitive employment should be able learn about, receive advice about, and gain access to all of the necessary services with the least effort possible, preferably with a single call or office visit. Thereafter, each of the services provided to our customer should be sufficiently integrated with all of the other services so that they collectively accomplish the common goal of long-term employment and permanent attachment to the workforce.

BRIDGE will emphasize the need to focus on the point of the delivery of services and the need to be flexible and adapt to state and local conditions. For this reason, state and local agencies will be given the greatest leeway possible to assemble and organize consortiums that best serve their populations. BRIDGE grantees would be encouraged to adopt coordinated and integrated service delivery approaches:

- establishing formal interagency work groups and alliances that include the customer perspective;
- entering into formal agreements for information exchange and coordination;
- involving employers and unions in the public and private sector in planning and designing services and systems;
- developing selected needed waivers of federal and state program requirements (e.g., Medicaid waivers and individual waivers of SSA eligibility and income requirements under SSA demonstration authority);
- developing state, local, not-for-profit and private expertise in identifying existing model employment service models and assisting individuals in the use of the myriad of programs and incentives;
- improving and enhancing case management and supporting development of the individual's ability to self-manage program services and benefits; and

Target Population

Individuals with mental or physical disabilities, or both, who are participants in Federal, State, and local public support programs (e.g., TANF, SSI, SSDI, Medicaid, Medicare,

subsidized housing, and food stamps, etc.) will be served in the BRIDGE program.

Eligible Applicants

Each applicant must be a consortium of state and/or local agencies that provide or could provide a range of supports and services to adults with disabilities which lead to finding and keeping employment. The agencies must have the legal authority to provide the services they propose. Consortia may include not-for-profit providers of employment, assistive technology, health and other related services to adults with disabilities.

Successful applicants would demonstrate that they have identified the means to integrate and coordinate the services provided across agencies and to remove barriers to employment for adults with disabilities. Successful applicants would also demonstrate that they consulted with diverse elements within the community of adults with disabilities in the planning, implementation, and evaluation of the project.

Finally, each applicant would be required to demonstrate an ability and willingness to expend some percentage of the grant funds to evaluate their coordination and integration efforts in a valid and reliable manner.

Availability of Funding

BRIDGE grants would be awarded from a national account of \$150 million in FY 2000. Grants would last for three years with funding in FY 2001 and FY 2002 being contingent upon subsequent appropriations. Funds will be available for both systems change that benefits all customers with disabilities as well as systems change that benefits targeted sub-populations within the disability community. Current funding for traditional disability employment programs would not be supplanted by this initiative.

Expected Outcomes

These grants will produce a diverse array of integrated and coordinated service systems in states and local areas across the country that will effect the following. Some of the expected outcomes will include the following:

Adults with disabilities will:

- enter into gainful employment within a competitive work environment at a higher rate of pay than they do currently;
- more easily and rapidly access a wider and more diverse array of employment services resulting in efficient and rapid job placement that will improve job skills, job opportunities, job placement, and job retention for adults with disabilities;
- be more satisfied with employment and related support services;

- have more input concerning their life goals and career plans;
- have more choices with respect to employment and career decisions;
- be more readily accommodated within the work force;
- have a better understanding of work incentive provisions; and
- report that their quality of life has improved.

State and local service delivery systems will:

- be less fragmented, have improved communication across systems, and be more efficient by decreasing duplication of services;
- be more user friendly and customer oriented;
- be more cost-effective than services provided in less integrated delivery service systems;
- systematically decrease barriers to employment of adults with disabilities at state and local levels (e.g. lack of: transportation, health care/insurance, education, workforce training, housing, assistive technology, civil rights, on-site and off-site job accommodations and long-term follow-along supports);
- increase the use of Medicaid waivers and individual waivers of SSA eligibility and income requirements; and
- realize substantial cost savings in terms of reducing the costs of public benefit programs.

Outstanding Administrative and Policy Issues to be Decided

1. Should grants be given out exclusively on a competitive basis, or should there be a formula component to assure that every state participates in this activity? For example, should some portion of the money be given to states or cities by formula and the remaining given to local consortiums by competition?

Option#1: large, systemic system change that benefit all adults with disabilities would be formula dollars and systems change that serve targeted sub-populations most in need of change would be awarded on a competitive basis

Option#2: all awards would be on a competitive basis

Evaluation is built into SSA + Dept of Ed Admin

SSA = about \$ 90 / yr on evaluation for demo

Task Force + Ed. stressed importance of strong evaluation

18 September 98

TO: CECILLIA ROUSE & CYNTHIA RICE
FROM: JUDITH E. HEUMANN & CURTIS RICHARDS
RE: REVISED OPTIONS FOR "BRIDGE" PROGRAM EVALUATION

Labor Dept - won't we spend all the \$ on evaluation

what do we mean by rigorous

ISSUE:

SSA = fu Johnson interested funding some projects

How should grantees under the proposed Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE) Program be evaluated?

BACKGROUND:

The Department of Education and the Social Security Administration are conducting separate, but coordinated, competitions to fund model demonstration projects of program coordination and systems change designed to increase the employment outcomes for individuals with disabilities. The Social Security Administration soon will be awarding a contract to conduct an evaluation of these demonstration projects.

The evaluation will include two site visits to each project per year in order to evaluate the way the State Projects are organized, monitor record-keeping, provide guidance and technical assistance, and identify the elements of the demonstration that lead to positive work outcomes for beneficiaries. The primary goal of the evaluation is to analyze the systems which State Projects develop to streamline employment and rehabilitation services and other supports. The second, related component, is to measure the outcomes for participants and describe how changes in the infrastructure of each of the State's service delivery systems leads to these outcomes.

OPTIONS FOR CONSIDERATION:

1

Building on these demonstration efforts, the Task Force on the Employment of Adults with Disabilities is proposing a similar, but much more significant, FY 2000 initiative known as the Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE) Program. An evaluation component of this program will be critical. Below are two options for consideration as the BRIDGE Program takes shape.

1. Longitudinal Study: This option would require five waves of data collection on a statistically significant sample of individuals served by each project as well as interviews and reviews of documents. Each wave would include: a) site visits for the purpose of interviewing relevant personnel, obtaining data from case records, project records and other sources, and b) surveys of a sample of consumers who were followed longitudinally. The first data collection wave would focus on obtaining baseline data on relevant elements of the local communities and states involved including descriptions of service delivery networks, program cooperation and coordination, and local economic and labor market characteristics. Baseline data would also be obtained on a significant sample of consumers regarding employment histories, enhanced data on their disabilities, additional data on current and prior receipt of services, and their expectations regarding the services they have applied for. Comparative data would be gathered from matched geographic areas/communities not directly affected by the demonstrations using available records, and this comparative data would be monitored during each successive wave of data collection. The remaining four waves of data collection would occur one year apart and would query the consumers on their satisfaction with services and the outcomes they obtained including employment outcomes and integration into the community. New consumers would be inducted into the study sample during waves two and three and would also be followed longitudinally in order to assess the affects of project implementation on the consumer population over time. During each wave, the study sample's case records would be abstracted, and project records, cooperative agreements, policies, procedures, relevant State and local legislation, etc. would be reviewed and service providers, managers, administrators, State

and local decision makers and other key personnel involved would be interviewed to document the projects' systems change, infrastructure-building, and program integration. The purpose of the interviews and records review would be to provide an analysis of what changes occurred at the State and local levels, how they were accomplished, and how they achieved or encouraged the achievement of consumer outcomes. Where the service model permitted, there would be random assignment of individuals to either model or conventional services to identify the services' impact. There would be a comprehensive analysis of the integrated project database and relevant ancillary databases (e.g. Unemployment Insurance, etc.). This option would provide information on the impact of services at project or sub-project level (at least, where the services models permitted), and comprehensive information on project evolution, services provided, and outcomes attained. This would provide the richest analytical database for subsequent decision making. It is estimated that the cost of Option 1 would be \$10 million to \$12 million.

*Are these
one yr
costs?*

2. Documentation of Model Projects' Processes and Consumer Surveys: This option also would require five waves of data collection but would not select a sample of consumers to be followed longitudinally. Each wave would consist of site visits for the purpose interviewing relevant personnel, obtaining data from case records, project records and other sources. The first data collection wave would focus on obtaining baseline data on relevant elements of the local communities and States involved including descriptions of service delivery networks, program cooperation and coordination, and local economic and labor market characteristics. During the first wave, baseline data would also be obtained on a significant sample of consumers whose cases had recently been closed regarding the services they received, their satisfaction with services, their employment backgrounds, dependence on public assistance and current employment situation. Data would be abstracted from their case records documenting their trajectory through services. Comparative data would be gathered from matched geographic areas/communities not directly affected by the demonstrations using available records, and this comparative data would be monitored during each successive wave of data

collection. The remaining four waves of data collection would occur one year apart. During each wave project records, cooperative agreements, policies, procedures, relevant State and local legislation, etc. would be reviewed and service providers, managers, administrators, State and local decision makers and other key personnel involved would be interviewed to document the projects' systems change, infrastructure-building, and program integration. The purpose of the interviews and records review would be to provide an analysis of what changes occurred at the State and local levels, how they were accomplished, and how they achieved or encouraged the achievement of consumer outcomes. During the fifth data collection wave, another statistically significant sample of consumers, whose cases had recently been closed, would be surveyed and data would be obtained on the services they received, their satisfaction with services, their employment backgrounds, dependence on public assistance and current employment situation. Data would be abstracted from their case records documenting their trajectory through services. The sample surveyed in the first wave would then be compared with the sample surveyed in the fifth wave. There would be a comprehensive analysis of the integrated project database and relevant ancillary databases as in Option 1. It is estimated that the cost of Option 2 would be \$8 million to \$10 million.

*How to
bring
it up*

As a condition for receiving grants, all applicants should agree that they will adopt computerized, integrated data systems with key data identical across all projects, and grant funds should support the development and implementation of such systems. The computerized data systems should include: a) uniform (for all projects) case record data on each person served including characteristics of individuals served, services provided, service costs, and employment outcomes and b) a real-time tracking system so the individual's trajectory through the integrated, coordinated service system can be documented along with the support services provided and those service costs. These data systems should include links to other key databases including Welfare, JTPA, Unemployment Insurance, etc. Moreover, at the project level (which transcends the case level) a uniform taxonomy of services should be adopted by all projects as well as uniform methods of accounting for key costs -- particularly

overhead costs.

14 September 98

TO: CECILLIA ROUSE & CYNTHIA RICE

FROM: JUDITH E. HEUMANN & CURTIS RICHARDS

**RE: LINKAGES BETWEEN THE PROPOSED "BRIDGE"
PROGRAM & EXISTING COMPETITIONS**

ISSUE:

How will the proposed BRIDGE Program be linked and/or integrated with similar existing grant and cooperative agreement programs, such as the ones administered by the Social Security Administration and the Department of Education?

BACKGROUND:

Currently, there are two coordinated efforts underway to establish model demonstration projects that stimulate and advance systems change in order to expand competitive employment outcomes for individuals with disabilities. With \$4.5 million, the Social Security Administration is coordinating one demonstration grant competition targeted at people with disabilities who are on SSI or SSDI. With another \$2 million, the Department of Education, through its Rehabilitation Services Administration, is coordinating another competition aimed at removing employment barriers for individuals with disabilities on any form of public assistance.

Both efforts have the participation of other Departments, such as Labor and Health & Human Services. Both efforts are coordinated with the assistance of an Interagency Employment Initiative Committee. And, there is a coordinated evaluation mechanism for both efforts, as well, administered by the Social Security Administration. Grants and cooperative agreements under both efforts will be in place by September 30th. The Department of Education expects to fund five or six projects, while the Social

When will they be ready to announce?

Security Administration anticipates funding 10 demonstration projects.

Through the Task Force on the Employment of Adults with Disabilities, an FY 2000 budget request has been proposed and is beginning to take shape. The proposal is to create a new \$150 million grant program known as the BRIDGE Program. The purpose of this proposed grant program would be to increase the employment rate of adults with disabilities by fostering the development of consortiums among state and local disability service systems or programs that promote full integration of employment-related services and support to adults with disabilities. The work of the consortiums would be to identify and eliminate conflicting policies and programmatic barriers, and to create policies and programs that integrate service delivery systems and the support services needed to obtain and maintain employment.

OPTIONS FOR CONSIDERATION:

What will be the relationship of the existing projects to the new BRIDGE Program? What will the impact of the BRIDGE Program be on the existing projects, and vice versa? How can duplication be avoided, and lessons learned be applied? Should there be any linkages? If so, what should they be?

The existing demonstration projects will be in their second year of funding by the time the BRIDGE Program competition could be completed. Preliminary data would be available, but a full scale evaluation of the existing projects will not.

Below are several options which must be considered when shaping a new grant competition, such as is proposed with the BRIDGE Program. Any one, or a combination, of these options could be built into the BRIDGE Program proposal.

*Edmund?
prefers*

DIRECTED COMPETITION: Under this option, the BRIDGE Program would be a "directed" competition, or set of competitions, designed to create a hybrid of the two existing

Education's current demo not discussed

projects using any lessons learned by that point in time as well as use information based on preliminary data analyses. For example, the grant application could require a broader base of agency participants than the two existing demonstration projects.

- 2) **ALL NEW COMPETITION:** Another option would be to run a separate, disconnected grant competition to spread the money around and draw additional proposals from state and local jurisdictions. Under this option, there would be no direct linkage between the existing demonstration projects and the BRIDGE program.
- 3) **SUPPLEMENT EXISTING PROJECTS:** One option is to have the BRIDGE Program competition limited to simply providing an augmentation for the existing projects, particularly for those which are substantially undefunded.
- 4) **FUND NEXT PRIORITIES FROM EXISTING COMPETITIONS:** An option for linkages also could be to use new BRIDGE Program dollars to fund the next levels of acceptable demonstration projects under the Education and Social Security competitions. In other words, if, for example, Social Security had 18 viable projects under its competition, but was only able to fund the top 10, then BRIDGE funds could be directed toward the next eight applicants.

Under any option, or combination of options, the BRIDGE Program must be viewed as both an opportunity to create "glue" or "magnet" money to draw resources from a variety of places, as well as an opportunity for practicable demonstration projects.

*Issue - do current demos become subject of BRIDGE?
OR -> collaborate on grants
-> collaborate on evaluation*

Consider current SSA + Education as demos for BRIDGE

*SSA review 26 applications 3 - funded 9 + will do four more
- wanted to fund 16*

Edin - funded 4 -> may do 2 more -> ~~would not fund 2 more~~



Cynthia A. Rice

09/20/98 05:24:38 PM

Record Type: Record

To: Cecilia E. Rouse/OPD/EOP, Lisa M. Brown/OVP @ OVP
cc: Cynthia Dailard/OPD/EOP, Sonyia Matthews/OPD/EOP
Subject: Friday's BRIDGE meeting and next steps

In your absence:

1) NEXT MEETING

We tentatively planned to meet again on Thursday September 24th from 2:00-3:30.
Does that time work for you?
Is rm 239 available?
If so, can Sonyia send out a reminder?

2) ISSUES DISCUSSED

a) Options for Defining the Consortium

We discussed the Sept. 16th options paper prepared by DOL. DOL and the Task Force recommended option 2 (b) [which encompasses 2(a)], in which applicant consortiums would be required to include 3-4 core agencies and would gain additional points in their applicant evaluation if additional agencies were included. Nearly everyone agreed upon this option, but had slightly different lists of who would be mandatory and who should be optional. Andy Imparato of the National Council on Disability prefers option 1(b) which encourages but does not require any agencies to be in the consortia but was willing to entertain option (2). Questions on the table include: should TANF (Bob Williams strongly advocated yes), state education agency & school to work (Andy and Becky argued yes) and state DDMR agencies (Becky and Marie Strahan from SSA argued yes) be mandatory? Shouldn't employers, non profits, people with disabilities, and housing agencies be at least on the extra point list? Next steps: DOL will redraft its option paper to present alternative combinations of mandatory and optional consortia members.

b) Target Population Issues

DOL and the Task Force recommended Option #3, but there was a great deal of discussion as to whether \$150 million would be enough to provide grants for 1) systems integration to help all people with disabilities and 2) for demonstration projects for special populations. If so, should an application process allow consortia to apply for 1 & 2 separately or would an applicant have to do #1 in order to propose to do #2? One option is to have a separate pot of funding for each purpose. Bob Williams made the point that we would want to fund demonstrations in order to learn more about what works. Andy Imparato made the point that we need to be concerned about equity -- we don't want to repeat past history of directing most funding to certain subpopulations. Next steps: DOL will redraft its option paper to present new alternatives based on the discussion.

c) Allowable Activities

The discussion centered around the issues of 1) whether "pre-service" activities should be

allowable and what that term means and 2) should acquisition of computer software and hardware be allowable. DOL is going to rethink these issues and present updated options paper.

3) Agenda for next meeting:

- a) Linkages bet. proposed BRIDGE program and existing competitions (9/14 memo)
- b) Revised options for BRIDGE program evaluation (9/18 memo-- revised from 9/14)
- c) Options for Defining the Consortium (revised DOL memo to be produced)
- d) Target Population Issues (revised DOL memo to be produced)
- e) Allowable Activities (revised DOL memo to be produced)

Next meeting

⇒ ① Allowable activities

② Mechanism for distribution of funding

Nov. 16th Task Force mtg

↳ would be ideal time to announce

Thurs Oct 1st 2:00 in Rm 239

Jeanne Co

0803



News Release

SOCIAL SECURITY

Vice President Al Gore Announces 5-year, \$25 Million Grant Program at the Social Security Administration

Vice President Al Gore announced today that the Social Security Administration will award grants to nine States initially totaling \$4.4 million to develop innovative projects to assist adults with disabilities in their efforts to reenter the work force. These competitive grants are the first of a five-year \$25 million program designed to provide coordinated approaches to increase work opportunities for people with disabilities.

"I am pleased to announce this new grant that will help people with disabilities and severe mental illnesses return to work and take their place as full members of the American family," Vice President Gore said. "We know every time a person with mental illness or disability is able to keep and obtain a job, it doesn't just benefit them--it enriches our whole society."

The grants are the first activity launched under an Executive Order signed on March 13, 1998 by President Clinton that created the National Task Force on Employment of Adults with Disabilities. This task force will establish a coordinated and aggressive national policy to bring working age individuals with disabilities into gainful employment at a rate similar to that of the general population.

The goal of the State projects is to return as many participants as possible to work. It is expected that the new approaches developed by States will create Federal/State partnerships and serve as models for other States to replicate.

"We want to make sure that those individuals with disabilities who want to work have access to programs that will allow them to do so," Kenneth S. Apfel, Commissioner of Social Security, said. "These awards will help States develop state-wide programs of services and support for their residents with disabilities that will increase job opportunities for them and decrease their dependence on benefits -- including Social Security and Supplemental Security Income (SSI)."

-- M O R E --

States receiving demonstration funding include:

- California, \$509,887
- Minnesota, \$517,243
- New Mexico, \$660,690
- New Hampshire, \$464,284
- North Carolina, \$290,549
- Oklahoma, \$292,625
- Ohio, \$349,980
- Wisconsin, 946,525
- Vermont, \$341,481

Other federal agencies such as the Department of Labor, the Department of Health and Human Services and the Department of Education will join the Social Security Administration in support of these projects.

SSA pays monthly disability insurance benefits to some 6.2 million workers and their families at an annual cost of \$50.6 billion. Another 5.2 million individuals receive disability benefits under the SSI program, totaling \$25 billion annually.

#

NOTE TO CORRESPONDENTS: ABSTRACTS OF STATE PROGRAMS ARE ATTACHED.

California

California - Lead Agency: Department of Rehabilitation (DR)

Project Name: Individual Self-Sufficiency Planning (ISSP)

Initial Year Funds Approved: \$509,887

Target Population: People with severe psychiatric disabilities

Abstract: The Individual Self-Sufficiency Planning project will involve three of the 28 existing DR/Mental Health Cooperative Project sites; and it will add services for at least 200 individuals with severe psychiatric disabilities each year at sites that have One-Stop Career Centers. The sites will enhance services through adding two staff positions: a Benefits Coordinator and a Service Coordinator. The service delivery to the individual will use a team approach with representatives of SSA, State Rehabilitation, State Mental Health, and other relevant agencies. At the State level, a State Coordinating Council will seek waivers from SSA, HCFA, and perhaps others (i.e., HUD). The waivers will be used to pilot ways to encourage adults with disabilities to work and be less dependent on public assistance. They propose to seek Medicare, Medicaid and SSI waivers to extend Medicare beyond the Extended Period of Eligibility, to allow Medical income limits for SSI recipients and to define property essential to self support more broadly.

Sites: To be determined from the 28 project sites.



Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

California State Statistics

Social Security Beneficiary Data – December 1997

o Total	4,027,852 beneficiaries	\$2,848 million	\$707 average monthly benefit
Retired workers	2,570,010	\$1,996 million	\$777 average monthly benefit
Their dependents	341,013	\$ 133 million	\$390 average monthly benefit
Disabled workers	386,778	\$ 285 million	\$736 average monthly benefit
Their dependents	122,489	\$ 25 million	\$206 average monthly benefit
Survivors	607,562	\$ 409 million	\$673 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 14.7 million residents worked in Social Security covered employment.
- o Covered earnings totaled about \$306 billion.
- o About \$38 billion was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	1,023,102 beneficiaries	\$479 million	\$443 average monthly payment
Aged	323,906	\$131 million	\$398 average monthly payment
Disabled & Blind	699,196	\$348 million	\$464 average monthly payment

Minnesota

Minnesota -- Lead Agency: Department of Economic Security, Rehabilitation Services Branch

Project Name: Making Work Pay: Reducing Medicaid and Social Security Barriers to Employment

Initial Year Funds Approved: \$517,243

Target Population: SSA beneficiaries who are VR consumers (with mental illness, mental retardation, physical impairments)

Abstract: The project will address barriers created by the fear beneficiaries have of losing public health insurance and income supports. Barriers will be addressed through education on available work incentives, promotion of VR services, and the use of waivers pertaining to Medicaid Earned Income Disregard and suspending the Extended Period of Eligibility (EPE). Minnesota is expecting approval of an 1115 waiver in October 1998. This waiver includes the "Medicaid Earned Income Disregard Waiver" which will give employed persons on SSDI who require personal care assistance access to continued Medicaid coverage. The project involves good employment and health care agency coordination and addresses major health care concerns and long-term care needs. It also reflects strong involvement and commitment of consumers and advocates.

Sites: Primarily Minneapolis and St. Paul with consultation with individuals available statewide.



Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

Minnesota State Statistics

Social Security Beneficiary Data – December 1997

o Total	720,723 beneficiaries	\$499 million	\$693 average monthly benefit
Retired workers	468,074	\$353 million	\$754 average monthly benefit
Their dependents	60,725	\$ 24 million	\$389 average monthly benefit
Disabled workers	60,204	\$ 42 million	\$705 average monthly benefit
Their dependents	19,775	\$ 4 million	\$200 average monthly benefit
Survivors	111,945	\$ 76 million	\$682 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 2.8 million residents worked in Social Security covered employment.
- o Covered earnings totaled about \$55.5 billion.
- o About \$6.9 billion was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	62,621 beneficiaries	\$22 million	\$324 average monthly payment
Aged	10,286	\$ 2 million	\$222 average monthly payment
Disabled & Blind	52,335	\$20 million	\$344 average monthly payment

New Hampshire

New Hampshire - Lead Agency: Division of Behavioral Health

Project Name: Project Dollars and Sense

Initial Year Funds Approved: \$464,284

Target Population: SSI/SSDI beneficiaries with serious mental illness

Abstract: This project will integrate current workforce development efforts in ways that increase efficiency of operations, enhance program quality and outcomes, and ultimately increase the number and wages of individuals with disabilities in meaningful jobs. The project will request waivers from HCFA, SSA, and HUD. Employment services will be integrated through One-Stop Career Centers, a centralized location that can simplify the service interface for consumers. The project will also explore new structures such as "Consumer Credit Unions" to help solve the complicated financial problems of consumers and establish a Statewide management information system. The project will culminate in two regional pilots (in Keene and Manchester) to test employment vouchers in years 3-5 of the funding. New Hampshire will pursue a Medicaid buy-in Option and waivers from HUD, and SSA (if waiver authority is restored).

Sites: State wide with two pilots for employment vouchers in the last 3 years in Manchester and Keene.



(August 1998)

Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

New Hampshire State Statistics

Social Security Beneficiary Data -- December 1997

o Total	189,845 beneficiaries	\$136 million	\$715 average monthly benefit
Retired workers	126,585	\$ 98 million	\$775 average monthly benefit
Their dependents	10,940	\$ 5 million	\$417 average monthly benefit
Disabled workers	19,992	\$ 14 million	\$723 average monthly benefit
Their dependents	7,965	\$ 2 million	\$193 average monthly benefit
Survivors	24,363	\$ 17 million	\$701 average monthly benefit

Social Security Earnings and Employment Data -- 1994

- o About 700,000 residents worked in Social Security covered employment.
- o Covered earnings totaled about \$14.1 billion.
- o About \$1.7 billion was paid in Social Security taxes.

Supplemental Security Income (SSI) Beneficiary Data -- December 1997

o Total	11,098 beneficiaries	\$4 million	\$307 average monthly payment
Aged	1,202	\$.2million	\$177 average monthly payment
Disabled & Blind	9,896	\$3 million	\$323 average monthly payment

Nationally there are currently 5.2 million persons receiving SSI payments based on a disability. Of those, 90,368 are working.

In New Hampshire there are currently 9,896 persons receiving SSI based on a disability. Of those, **1,177 are currently working.**

New Mexico

New Mexico -- Lead Agency: Department of Rehabilitation,
Division of VR

Project Name: Succeed

Initial Year Funds Approved: \$660,690

Target Population: SSI/SSDI beneficiaries with
disabilities, especially those with mental illness.

Abstract: This project is an interagency cooperative project that coordinates and links systems among the various agencies and service providers through coordinating agreements and memoranda of understanding at the State and local level. The project will provide training and employment support for professionals, agency staff, employers, and consumers. It will also involve professional peer employment liaisons who are people with disabilities who have completed college and/or successfully entered careers. New Mexico will develop new job opportunities through educating employers about tax incentives, supported employment, and natural supports. They will also request a Medicaid waiver.

Sites: Albuquerque and Roswell



Fact Sheet

SOCIAL SECURITY

Kenneth S. Apfel, Commissioner

New Mexico State Statistics

Social Security Beneficiary Data – December 1997

o Total	262,695 beneficiaries	\$166 million	\$634 average monthly benefit
Retired workers	150,981	\$108 million	\$717 average monthly benefit
Their dependents	24,921	\$ 9 million	\$353 average monthly benefit
Disabled workers	28,618	\$ 20 million	\$705 average monthly benefit
Their dependents	12,765	\$ 2 million	\$182 average monthly benefit
Survivors	45,410	\$ 27 million	\$591 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 860,000 residents worked in Social Security covered employment.
- o Covered earnings totaled about \$13.7 billion.
- o About \$1.7 billion was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	45,365 beneficiaries	\$15 million	\$313 average monthly payment
Aged	9,497	\$ 2 million	\$197 average monthly payment
Disabled & Blind	35,868	\$13 million	\$343 average monthly payment

North Carolina

North Carolina -- Lead Agency: Department of Health and Human Services, Division of VR Services (DVR)

Project Name: Alliance for Employment Enhancement (AEE)

Initial Year Funds Approved: \$290,549

Target Population: SSI/SSDI beneficiaries who have severe and persistent mental illness and are served by DVR; beneficiaries who are blind or visually impaired and are served by the Division of Services for the Blind; and consumers who have physical disabilities who might be able to transition to employment through the North Carolina Independent Living Program.

Abstract: The project will use interventions in two cities, Raleigh and Charlotte, to increase employment and decrease reliance on public supports. Asheville will be selected to collect control group data. The project will reduce uncertainty about the effect of increased wages on benefits and streamline access to employment supports and services. It will do this by: using benefit counselors; increasing incentives for working via waivers to raise the SSI earned income disregard; and ensuring health care by increasing the SSI 1619 threshold, targeting employers who provide health benefits, and providing specific training to make participants attractive to those employers. For one group of clients, they would also provide funds for child care and transportation. North Carolina will seek waivers to increase the SSI section 1619(b) threshold; and raise the SSI earned income disregard.

Sites: Raleigh and Charlotte, Asheville will be control group site



Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

North Carolina State Statistics

Social Security Beneficiary Data – December 1997

o Total	1,278,793 beneficiaries	\$845 million	\$661 average monthly benefit
Retired workers	782,645	\$571 million	\$730 average monthly benefit
Their dependents	71,996	\$ 27 million	\$379 average monthly benefit
Disabled workers	170,738	\$117 million	\$687 average monthly benefit
Their dependents	53,875	\$ 11 million	\$199 average monthly benefit
Survivors	199,539	\$119 million	\$594 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 4.2 million residents worked in Social Security covered employment.
- o Covered earnings totaled about \$75.3 billion.
- o About \$9.3 billion was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	193,135 beneficiaries	\$59 million	\$286 average monthly payment
Aged	40,382	\$ 6 million	\$158 average monthly payment
Disabled & Blind	152,753	\$53 million	\$320 average monthly payment

Ohio

Ohio -- Lead Agency: Department of Mental Health

Project Name: Jobs Incentive Focus (JIF)

Initial Year Funds Approved: \$349,980

Target Population: People with serious mental illness

Abstract: JIF will achieve significant increases in employment among people with serious mental illness through 4 strategies that will focus on the Department of Mental Health's (DMH) own leadership. DMH will collaborate with the Ohio Rehab Services Commission and providers to educate consumers and providers about benefits; increase employment opportunities available to clients through Employer Liaisons in the demo sites; and develop a research-based job taxonomy to improve providers' capacity to make successful job matches. DMH will collaborate with other State agencies, including Medicaid, to ensure that current work incentives are fully used and to modify eligibility criteria where necessary to reduce barriers to financial independence. They plan to seek waivers for Medicaid (to implement section 4733 of the Balanced Budget Act on a less than Statewide basis) and for SSDI (similar to section 1619 for SSI), if waiver authority is restored.

Sites: Franklin County (includes Columbus), Portage County (borders Lake Erie), Montgomery County (includes Dayton), Western Ohio Rural Federation (a coalition of local mental health boards in mostly rural and some suburban communities)



Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

Ohio State Statistics

Social Security Beneficiary Data – December 1997

o Total	1,896,613 beneficiaries	\$1,344 million	\$709 average monthly benefit
	Retired workers	1,138,445	\$ 889 million
	Their dependents	168,083	\$ 68 million
	Disabled workers	183,726	\$ 135 million
	Their dependents	64,697	\$ 13 million
	Survivors	341,662	\$ 239 million
			\$781 average monthly benefit
			\$406 average monthly benefit
			\$734 average monthly benefit
			\$206 average monthly benefit
			\$699 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 5.8 million residents worked in Social Security covered employment.
- o Covered earnings totaled about \$108 billion.
- o About \$13.4 billion was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	247,018 beneficiaries	\$94 million	\$355 average monthly payment
	Aged	19,714	\$ 4 million
	Disabled & Blind	227,304	\$90 million
			\$207 average monthly payment
			\$368 average monthly payment

Oklahoma

Oklahoma -- Lead Agency: Department of Rehabilitation Services

Project Name: Oklahoma Keys to Increasing Employment

Initial Year Funds Approved: \$292,625

Target Population: Consumers of mental health services who are SSI or SSDI beneficiaries/applicants.

Abstract: In the Keys project, the Department of Rehabilitation Services will collaborate with the Departments of Mental Health and Substance Abuse Services and the Oklahoma Health Care Authority to focus on creating an integrated service delivery system with special emphasis on incentives for effective long term support and job retention. The project will compare the existing employment model with an enhanced employment model, called the KEYS model, using consumer choice of providers and a combined milestone/voucher payment system. The model will emphasize work incentive education and will enhance long term support by adding job retention vouchers, similar to that described in the Ticket to Work and Self Sufficiency legislation. Milestone payments would be paid to providers with a higher rate of payment for placement in jobs with medical benefits. It will be tested at 6 sites, at least 2 rural. Oklahoma will request a Medicaid waiver.

Sites: First Year, Tulsa and Oklahoma City with 2 sites in each city; Future, 2 rural (one with a minority focus)



Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

Oklahoma State Statistics

Social Security Beneficiary Data – December 1997

o Total	582,961 beneficiaries	\$386 million	\$662 average monthly benefit
Retired workers	352,040	\$257 million	\$729 average monthly benefit
Their dependents	46,848	\$ 17 million	\$373 average monthly benefit
Disabled workers	58,605	\$ 42 million	\$711 average monthly benefit
Their dependents	21,297	\$ 4 million	\$199 average monthly benefit
Survivors	104,171	\$ 66 million	\$633 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 1.7 million residents worked in Social Security covered employment.
- o Covered earnings totaled about \$27.9 billion.
- o About \$3.5 billion was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	73,791 beneficiaries	\$24 million	\$306 average monthly payment
Aged	13,303	\$ 2 million	\$164 average monthly payment
Disabled & Blind	60,488	\$22 million	\$337 average monthly payment

Vermont

Vermont --Lead Agency: Division of Vocational Rehabilitation

Project Name: Work Incentive, Counseling and Assistance Program for SSI Recipients

Initial Year Funds Approved: \$341,481

Target Population: SSI recipients in Mental Health Centers and those working with VR

Abstract: This project, run by Division of Vocational Rehabilitation (VR), in cooperation with Division of Mental Health (MH), will provide SSI recipients in MH Centers and those working with VR with improved access to vocational services and employment outcomes, and improved benefits counseling on the impact that work will have on their benefits. The project will document the impact of these improved benefits, and compare the costs of providing these benefits with the savings that Federal and State governments will realize if these individuals go to work in much larger numbers than previously. It includes consumers as benefit counselors and evidence of good intra-agency collaboration.

Sites: Statewide



Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

Vermont State Statistics

Social Security Beneficiary Data – December 1997

o Total	100,267 beneficiaries	\$68 million	\$682 average monthly benefit
Retired workers	62,694	\$47 million	\$754 average monthly benefit
Their dependents	7,228	\$ 3 million	\$387 average monthly benefit
Disabled workers	11,191	\$ 8 million	\$686 average monthly benefit
Their dependents	4,170	\$.8 million	\$184 average monthly benefit
Survivors	14,984	\$10 million	\$660 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 350,000 residents worked in Social Security covered employment.
- o Covered earnings totaled about \$6 billion.
- o About \$740 million was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	12,715 beneficiaries	\$4 million	\$321 average monthly payment
Aged	1,900	\$.3 million	\$174 average monthly payment
Disabled & Blind	10,815	\$4 million	\$347 average monthly payment

Wisconsin

Wisconsin -- Lead Agency: Department of Health and Family Services

Project Name: Pathways to Independence

Initial Year Funds Awarded: \$946,525

Target Population: Individuals with physical disabilities, mental illness, developmental disabilities and AIDS/HIV

Abstract: This project is the product of 5 years of study and pre-testing. It will provide 1800 SSI/SSDI beneficiaries in four target groups with comprehensive help in securing and maintaining gainful employment in 15 to 20 sites. It will make better use of existing work incentives, and add new assurances of health and long term care coverage regardless of earnings. It will reduce fragmentation and assure participants are better off as a result of employment. The two lead agencies, The Department of Health and Family Services and the Department of Workforce Development will solicit proposals from local public or private organizations to serve as the Pathways access points, establish local networks and provide services. The services will include health and employment consultation to "pull all the pieces together" by involving vocational rehabilitation counselors, representatives from housing and transportation, prospective employers, mental health professionals and case managers for long term care services. The local organizations will also give advice about use of work incentives (1619, Impairment Related Work Expenses, PASS, etc.), help develop employment goals, assess skills, recruit employers and match employees to jobs. The project reflects significant outreach, coordination of services, counseling, follow-on support. Wisconsin will pursue a Medicaid buy-in under section 1733 of the Balanced Budget Act and combine several data bases to house all data in a single data base. If SSDI waiver authority is restored, they will seek a waiver to freeze trial work period for the 5 year duration of the project and elimination of the SSDI payment "cliff".

Sites: Fifteen sites to be determined by competition after award.



Fact Sheet

SOCIAL SECURITY
Kenneth S. Apfel, Commissioner

Wisconsin State Statistics

Social Security Beneficiary Data – December 1997

o Total	884,281 beneficiaries	\$638 million	\$721 average monthly benefit	
	Retired workers	582,205	\$456 million	\$784 average monthly benefit
	Their dependents	66,151	\$ 27 million	\$408 average monthly benefit
	Disabled workers	76,248	\$ 55 million	\$725 average monthly benefit
	Their dependents	26,425	\$ 5 million	\$205 average monthly benefit
	Survivors	133,252	\$ 94 million	\$705 average monthly benefit

Social Security Earnings and Employment Data – 1994

- o About 3.0 million residents worked in Social Security covered employment.
- o Covered earnings totaled about \$58.6 billion.
- o About \$7.3 billion was paid in Social Security taxes.

Supplemental Security Income Beneficiary Data – December 1997

o Total	90,580 beneficiaries	\$31 million	\$324 average monthly payment	
	Aged	11,294	\$ 2 million	\$186 average monthly payment
	Disabled & Blind	79,286	\$29 million	\$345 average monthly payment



SOCIAL SECURITY

Kenneth S. Apfel **Commissioner of Social Security**

Kenneth S. Apfel was nominated on May 23, 1997 by President Clinton and confirmed by the Senate on September 19, 1997 as the Commissioner of the United States Social Security Administration (SSA). Mr. Apfel has the honor of becoming the first confirmed Commissioner of Social Security since it became an independent agency in April of 1995. He brings a lifetime of leadership and public service experience to a position that has been frequently described as one of the most complex and challenging in the Federal government. He heads an agency that delivers benefits each month to more than fifty million people. He is responsible for the actions of approximately 65,000 employees who, among other responsibilities, serve the needs of twenty-six million visitors each year to SSA's 1,300 field offices and answers almost sixty-four million phone calls annually on the agency's toll-free telephone lines.

Kenneth S. Apfel came to SSA from the Office of Management and Budget (OMB) in the Executive Office of the President where he served since 1995 as the Associate Director for Human Resources. His responsibilities included budget, policy and management review of all the human resource agencies of the Federal government, including the SSA, the Departments of Labor and Education and parts of the Departments of Agriculture and Health and Human Services.

Prior to his appointment at OMB, Mr. Apfel served as Assistant Secretary for Management and Budget at the U.S. Department of Health and Human Services (HHS). He was nominated by President Clinton in March 1993 and was subsequently confirmed by the U.S. Senate. In this capacity, Mr. Apfel served as the senior budget official and chief financial officer for HHS. He formulated and executed the third largest budget in the world -- a \$700 billion budget for a department staffed nationwide by 125,000 people, with half of HHS' resources in support of SSA. During his tenure, Mr. Apfel served as a principal on the Secretary's task force to elevate SSA to independent agency status.

Before joining the Clinton Administration, Mr. Apfel worked for two decades in the area of social policy. From 1989-1993, he served as legislative director to Senator Bill Bradley, overseeing the formulation and development of all aspects of congressional policy making. During 1982-1989, he was the Senator's chief staff person for Federal social policy, with a particular focus on programs under the jurisdiction of the Senate Finance Committee. He served as the Senator's key staff person for the Committee's actions on the historic 1983 Social Security reform legislation.

Between 1980-1982, Mr. Apfel was committee staff for human resource programs for the U.S. Senate Budget Committee. From 1978-1980, he served a Presidential Management Internship at the U.S. Department of Labor. He was a college administrator from 1973-1976 at Newbury College in Massachusetts, coordinating a grant from the Department of Health, Education, and Welfare to provide outreach and remediation to veterans.

Kenneth S. Apfel was born in Worcester, Massachusetts, October 12, 1948. He received his bachelor's degree from the University of Massachusetts, Amherst, 1970; a master's in rehabilitation counseling, Northeastern University, 1973; and a master's degree in public affairs from the LBJ School of Public Affairs, University of Texas, 1978.

Mr. Apfel is married to Caroline Hadley and has two sons, Derek and Dana.

October 3, 1997



Fact Sheet

A. BENEFICIARIES IN CURRENT-PAYMENT STATUS, DECEMBER 31, 1997

Type of benefit	Number of beneficiaries [In thousands]	Monthly rate [In millions]	Average monthly amount
Total	43,971	\$30,464	(1)
Retired workers and their family members, total	30,638	22,167	(1)
Retired workers	27,275	20,864	\$765
Wives and husbands	2,922	1,149	393
Children	441	154	349
Survivors of deceased workers, total	7,180	4,718	(1)
Children	1,893	946	500
Widowed mothers and fathers with child beneficiaries in their care	230	122	532
Aged widows and widowers, and aged parents	4,869	3,559	731
Disabled widows and widowers	188	90	480
Disabled workers and their family members, total	6,153	3,579	(1)
Disabled workers	4,508	3,253	722
Wives and husbands	207	37	177
Children	1,438	289	201
Uninsured persons generally aged 72 and over before 1968	(2)	(3)	201

¹ Since the benefit amounts for workers and for the various types of family members and survivors are based on different proportions of the worker's benefit, average monthly amounts for groups of these different kinds of beneficiaries are not meaningful.

² Fewer than 500.

³ Less than \$500,000.

Note: Totals may not equal the sums of rounded components.

B. SELECTED CATEGORIES OF BENEFICIARIES (INCLUDED ABOVE) IN CURRENT-PAYMENT STATUS, DECEMBER 31, 1997

Type of benefit	Number of beneficiaries [In thousands]	Monthly rate [In millions]
Disabled beneficiaries (OASDI)--Workers, disabled children aged 18 and over, and disabled widows and widowers	5,401	\$3,673
Children (OASDI)	3,772	1,390
Student children	97	45
Disabled children aged 18 and over	705	330
Children under age 18	2,970	1,014
Survivor children and widowed mothers and fathers	2,123	1,069
Beneficiaries aged 62 and over (OASDI)	35,686	26,027
Beneficiaries aged 65 and over (OASDI)	31,883	23,547

Note: Totals may not equal the sums of rounded components.

**C. AVERAGE MONTHLY FAMILY BENEFITS IN
CURRENT-PAYMENT STATUS, DECEMBER 31, 1997**

Selected family ¹ group	Number of families [In thousands]	Average family benefit	Average number of beneficiaries per family
Retired worker alone	24,123	\$750	1.000
Retired worker and spouse, aged 62 and over	2,779	1,288	2.000
Disabled worker, spouse under age 65, and 1 or more children	151	1,197	4.044
Widowed parent and 2 children	74	1,509	3.000
Children of deceased worker ²	1,009	688	1.369
Aged widow(er) alone	4,701	731	1.000

¹ A family means beneficiaries entitled on one worker's account.

² In most cases, the family includes a widowed parent whose benefits are withheld due to earnings.

D. MEASURES OF PROTECTION

1. Coverage

About 148 million persons will work in OASDI-covered employment or self-employment in 1998. About 96 out of 100 jobs in paid employment and self-employment are covered or eligible for coverage under the program.

2. Retirement

Ninety-five percent of the people aged 65 and over at the beginning of 1998 were receiving benefits or would be able to receive benefits when they or their spouses retire.

3. Survivor

About ninety-eight percent of the children under 18 and their mothers or fathers (with children under age 16) can count on monthly cash benefits if a working parent dies.

4. Disability

About four out of five men and women aged 21-64 can count on monthly cash benefits in the event the wage earner suffers a severe and prolonged disability.

E. OPERATIONS OF OASI AND DI TRUST FUNDS, COMBINED

[In billions]

	Calendar year		Fiscal year		Cumulative 1937 through end of--	
	1996	1997	1996	1997	1996	1997
Income	\$424.5	\$446.6	\$5,461.3	\$5,802.1		
Contributions	378.9	398.5	5,100.0	5,414.3		
Other	45.6	48.1	361.3	387.9		
Expenditures	353.6	365.2	4,894.4	5,171.3		
Benefit payments	347.0	358.3	4,774.7	5,045.5		
OASI	302.9	312.9	4,247.7	4,484.3		
DI	44.2	45.4	527.0	561.2		
Other	6.5	7.0	119.6	125.8		
Assets, end of period	567.0	630.9	567.0	630.9		

Note: Totals may not equal the sums of rounded components.

Please check your name

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@ 9/24 mtg

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Next
mtg

Thurs ^(a) 2:00 1 1/2 hr
The 24th

The BRIDGE Program - Options on Allowable Activities

Background:

The discussion of options for allowable activities under the BRIDGE program is addressed under three possible grant scenarios:

- 1) Grants would only include systems change activities for the population of all adults with disabilities;
- 2) Grants would include both systems change activities and demonstration grants to provide pre-service functions for all adults with disabilities.
- 3) Grants would include both systems change activities for the population of all adults with disabilities and systems change activities that allow better service to targeted sub-populations.

Option #1) Allowable Activities for Only Systems Change Grants:

Allowable activities would include:

*many mandated
under One-Stop*

1. Establish new structures and partnerships that use existing local, state, and federal resources to integrate income assistance, health or other benefits, job training and job placement services, and other services relating to employment that serve or could serve adults with disabilities.
2. Link services with the One-Stop system in a manner that supports coordinated delivery of services to individuals with disabilities.
3. Establish cooperative agreements and coordinated activities among members of the consortium.
4. Provide training and technical assistance among consortium partners and to the workforce development system on availability of benefits, services, and training for adults with disabilities relating to employment, and the eligibility requirements for these benefits, services, and programs.
5. Promote equal, effective, and meaningful participation by individuals with disabilities in workforce investment activities in the state through training and technical assistance to consortium members on program accessibility.
6. Develop and implement common intake and referral procedures, customer data bases, resource information, and customer service hotlines.
7. Create unified information systems that link all components of statewide workforce investment system and other consortium partners relating to labor market information such as employment statistics, information on job vacancies, and resume and career planning.

- 8. Establish linkages with service providers outside the consortium required for adults with disabilities to find and keep gainful employment.
- 9. Establish linkages among local public agencies and not-for-profit service providers, community based organizations, and educational institutions necessary to the employment of adults with disabilities.
- 10. Evaluation of the efforts funded under these grants.

Prohibited activities would include:

- 1. Building construction and rental of facilities, except as required for participation in the One-Stop system.
- 2. Payment for direct services --- other than those specifically enumerated above --- to adults with disabilities.

Pros and Cons of Activities under Systems Change Only

Pros

- Would provide incentives to state systems -- workforce development, vocational rehabilitation services agencies, and others -- to integrate systems directed to "one point of delivery of service" for people with disabilities seeking employment.
- Would provide incentives to understand and implement waiver authorities under Medicaid and other SSA work incentives.

Cons

- Would primarily fund state or local bureaucracies that may or may not be able to improve service to people with severe disabilities.
- Does not allow for innovation and flexibility in services to disabled consumers since activities/services are delivered within the constraints of existing federal eligibility and other requirements.

Option #2. Allowable Activities for Systems Change and Demonstration Grants:

- a) Systems change allowable activities are those described above in Option #1.
- b) Allowable activities for demonstration grants would include only pre-service functions that are necessary to ensure the array of available programs and supports are made available to adults with disabilities seeking employment.

*DOC -
Wally
Vick*

what about kids? (Andy)

will do more research

Case management

1. Provision of information, referral, and employment-related counseling regarding services, programs, and benefits relating to employment through a single point-of-entry (whether electronic or staff) to adults with disabilities.

2. Acquisition of computer hardware and software to facilitate linking or consolidating information or services provided by existing state, local, and federal providers.

how is this different from #7 above?

Pros and Cons of Demonstration Grants with Pre-Service Functions

Pros

- Combined systems change and demonstration grant activities provide greater flexibility by and within states to meet their specific situations and need. This would be helpful since states and local areas vary in terms of how integrated and progressive their workforce systems and collaborative linkages have evolved to-date.
- Demonstration grants may expand upon, or leverage, coordinated local efforts supported under Welfare-to-Work demonstration grants, generally consortia of a broad spectrum of local service providers, funded projects to serve individuals with severe disabilities.

Cons

- Does not allow for innovation and flexibility in services to disabled consumers since activities/services are delivered within the constraints of existing federal eligibility and other requirements.
- Will not address inadequacy of training and employment opportunities for individuals with the most significant disabilities who may need personal assistance on the job.

Option #3. Allowable Activities for Only Systems Change Grants for All Adults with Disabilities and to Better Serve Targeted Populations

- a) Systems change allowable activities are those described above in Option #1.
- b) Allowable activities for systems change grants to better serve targeted populations include those activities described in Option #1, plus:

1. Training and technical assistance provided by publicly funded state entities serving explicitly defined sub-populations of adults with disabilities (e.g., blind, deaf, psychiatric, developmental disabilities, and others) to members of the consortium on the specific needs and barriers faced by their clients.

2. Identification and implementation of systems changes that address unique barriers to employment for the targeted sub-population, including linkages and improved access to

how diff from #4 above

Andy = important

Case management?

TOTAL P.17

transportation for those with mobility impairments, resolution of housing issues facing those experiencing deinstitutionalization or public housing support, and other similar barriers to entry into employment and job retention.

3. Identification and implementation of approaches to service delivery for targeted sub-populations that cut across state systems to address the specific barriers.

Pros and Cons for Systems Change Directed to Target Populations

Pros

- Would provide incentives to address other publicly or privately funded support systems that are necessary for some sub-populations of the disabled to obtain and retain employment.
- Would engage the expertise of national and local organizations servicing specific client groups to ensure their concerns for service delivery are met.
- Would increase likelihood of consumer organization involvement in systems change efforts.

Cons

- Might be too narrow in scope given amount of funds involved. ?

2

Draft: 9/15/98

BRIDGE Program's : Target Population Issues

Issues

- This options paper addresses whether successful grant applicants should be required to serve the general disability population, or should they also be permitted to serve sub-populations.

Option #1: Require that grants be used to fund systems change that benefits all customers with disabilities.

Pros

- Effectively requires grantees to address the large, systemic problems in their disability services delivery systems to address the common issues experienced by all adults with disabilities seeking employment.
- Decreases the chances of applicants choosing to focus on the easiest-to-serve groups within the disability community thereby assuring more equitable use of funds.

Cons

- States vary enormously with respect to systems change, effectiveness of different agencies, and the relationships between various agencies and programs. One size doesn't fit all.
- Populations that are the most under served and/or have the greatest need might not receive the special and extra attention they need.
- Customer involvement could be made more difficult.
- Could be more difficult to accomplish large, systemic change all at once with relatively modest grants. Change might better be accomplished in smaller, targeted efforts.
- Likely to be opposed by state and local officials, and their advocates in Congress, who will want to provide maximum flexibility to grantees.

Option #2: Require that grants be used to fund systems change that benefits only targeted sub-populations within the disability community. *applicant would have choice*

Pros

- Greater flexibility to applicants for targeting groups whose services are in the greatest need of systems change and developing innovative approaches to do achieve systems integration for those subpopulations.

2 pots of \$ Competitive
or
1 pot of \$ competitive

increases integration
demos for special
demos for subpots

- Easier to accomplish systems change in a smaller, targeted effort than in all systems at once, particularly with relatively small grants being given.

Cons

- Might result in "creaming." Sub-populations that are the most in need, most difficult to serve, and currently under served might receive less attention than others. However, "creaming" could be effectively addressed in the award criteria.
- Might result in only limited systems change rather than a widespread integration of systems that serve adults with disabilities.
- May not accomplish the larger goal of increasing the employment rate of adults with disabilities by allowing too narrow a focus for too small a population.

* Option #3: Require grantees to use grants to fund systems change that benefits all customers with disabilities but also permit applications for grants that fund systems change that benefits targeted sub-populations.

Labr prefers

would each grantee have to do both?
-> must do all -> create a special popo

Pros

- Offers a "best of both worlds" by allowing states to undertake large, systemic changes that benefit all adults with disabilities while also seeking funding that addresses systems that serve targeted sub-populations most in need of change.
- Gives some flexibility to state and local officials to design consortia in several ways and address their most acute systems change needs. May be sufficient to gain their support.

Cons

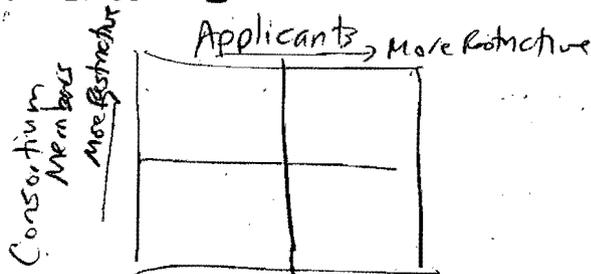
- Asks for too much to be accomplished with comparatively small amounts of money. As a result, it may not accomplish either goal.
- May not adequately address the "creaming" problem in the design of consortia to address the needs of targeted sub-populations. Again, "creaming" could be effectively addressed in the award criteria.

Q
Andy

is there enough \$ to do both?
equity @ national level - don't want to repeat history of favoring some subpopulations

subpopulations
- by type of disabilities
- by location (rural) etc

demos



September 16, 1998

The Bridge Program: Options for Defining the Consortium

Background

- The proposed Bridge program builds on existing programs that provide grants to consortia to better integrate service delivery for persons with disabilities, but these programs take distinctly different approaches to defining which entities have to be in the consortium and which entities are eligible to receive the grant on behalf of the consortium.
- The SSA program is least prescriptive in specifying the composition of the consortium but most prescriptive in defining eligible applicants.
- The SSA program does not specify that any agency or entity has to be in the consortium, but instead relies on the evaluation criteria for judging the adequacy of the grant application to ensure there is adequate cooperation and collaboration, including evidence of coordination with and commitment from (e.g. such as interagency agreements or other agreements) a number of different agencies and entities serving a broad range of persons with disabilities.
- At the same time, the SSA program limits eligible applicants to one type of entity — a State agency.
- In contrast, the Education program is fairly prescriptive in specifying a minimum core of five State agencies that must be in the consortium, and in specifying that the consortium must develop partnership agreements with a variety of other Federal, State and local entities.
- At the same time, the Education program is very flexible in defining eligible applicants by allowing the members of the consortium to designate one of their members to apply for the grant or allowing the consortium to establish a separate, eligible legal entity to apply for the grant.
- This options paper first presents options for defining the consortium, ranging from significant flexibility with no minimum core of participants to minimum flexibility with a long list of entities that must be included in a consortium, with suboptions for each option related to adding evaluation criteria that would give preference to applications that have the desired composition for their consortium.
- As a secondary issue, the paper then considers two different options for defining eligible applicants.

Options for the Composition of the Consortium

Option 1: (a) *Specify no required members of consortium*

Pros

- Would produce the greatest diversity in composition of consortia and perhaps greatest innovation in integrating service delivery for persons with disabilities.
- Allows effective and motivated agencies or programs to "work around" ineffective agencies and programs.
- Allows the greatest flexibility in tailoring the structure of consortia to a particular state's or locality's population of adults with disabilities.
- Will appeal to local and state officials, and to members of Congress who oppose federal mandates attached to federal funding.

*Andy -
7/20
in margin*

Cons

- May result in numerous applications for consortia — and, as a result, service delivery systems --- that do not include entities essential to promoting employment for persons with disabilities, such as voc rehab, the public health insurance agency, the local PIC or WIB, and public and private sector employers.
- Does not require bringing ineffective agencies or programs into an integrated service delivery system that would likely dramatically improve their performance.
- Could result in adults with disabilities not being mainstreamed into the job training and job placement systems if those agencies are not included in a consortium.

(b) *Specify no required members of consortium, but add general evaluation criteria similar to SSA criteria.*

Pros

- Retains significant flexibility for local and state officials, but encourages them (without a mandate) to include all of the appropriate agencies and programs in their consortia.

Andy

Cons

- Still likely to result in numerous applications that do not include the entities essential to promoting employment.
- Forces applicants to make an "educated guess" as to which structure of a consortium will "win" a grant by making requirements for participants in consortia less transparent than a specific, advance mandate.

Andy = what about kids
-> include state
spec agency
-> school to work

Option 2: * (a). **Require that every consortium include 3-4 core agencies -- Vocational Rehabilitation, the public health insurance agency, the SSI/DI agency, and the local Private Industry Council or Workforce Investment Board -- essential to promoting employment.**

? include TANF? Bob Williams
include state dev dis SSA

Pros

- Ensures that each consortium will include the agencies that provide the largest volume of services to the largest population of adults with disabilities that are essential to promoting employment.
- Permits a significant amount of diversity and innovation in consortia.
- Assures that the systems providing closely related services and, therefore, most in need of integration -- particularly the VR and WIB agencies --- are included in every consortium. Also, assures that the largest funding streams for services to adults with disabilities will be leveraged in the process of systems integration.
- Consistent with the Workforce Investment Act.
- Assures state and local officials, and their advocates in Congress, that their agencies will receive some portion of each grant.

Local SSA district field office

Cons

- May result in consortia that focus too heavily on persons with disabilities who are the hardest to serve.
- May result in consortia that do not involve nongovernmental entities essential to promoting employment -- e.g. public and private employers.
- Assures that every consortium will be focused in part, or dominated, by large public organizations rather than smaller not-for-profit entities.

* (b). **Add specific evaluation criteria requiring participation of other entities, including the state mental health agency, the state welfare agency, local school boards, local community colleges, the local transportation agency, local SSA district offices, and the local small business office and economic development agency.**

Andy = minimum # of agencies 2 or 3

private sector, nonprofits, PWDs housing
state development disability DDMR

Pros

- Provides structure allowing mandated consortia members to supervise and ensure performance of entities that are linked to consortia by agreements.
- Assures that consortia will not be limited to the mandated agencies, but permits some flexibility in the selection of additional participants in consortia.
- Increases the likelihood that consortia will include both agencies that traditionally participate in employment-related services for adults with disabilities and others that have not traditionally participated.

Labor / Task Force prefer (2a + 2b)

Cons

- May limit diversity and innovative consortia.
- Creates a class system in which certain agencies are deemed essential to the employment of adults with disabilities while others are stigmatized as "expendable."
- Forces applicants, in part, to make an "educated guess" as to which structure of a consortium will "win" a grant by making some requirements for participants in consortia less transparent than a specific, advance mandate.

Option 3: *Mandate members of consortium to include all agencies and entities included in Options 2(a) and 2(b).*

Pros

- Ang-no
- Ensures that all entities relevant to promoting employment of persons with disabilities and to serving those target groups that are the hardest to serve are included in the consortium.
 - Avoids requiring applicants to "guess" which agencies should and should not be included in their consortia.
 - Assures a comprehensive, integrated service system in those jurisdictions that participate in the grants program.

Cons

- Likely to be very complex to form consortium with so many mandatory members, and may create a disincentive to participation for some jurisdictions.
- Would eliminate concept of limited number of consortium members supervising and ensuring performance of other entities involved in effort.
- Prohibits flexibility for local and state officials and, as a result, may require structures and delivery systems that are not appropriate to a population of adults with disabilities in a particular state or locality.

Options for Defining Eligible Applicants

Option 1: (a). *Specify one governmental entity to receive grant, such as PIC or WIB.*

Pros

- Ensures that all consortia are led by the local governmental entity most essential to promoting employment of persons with disabilities.

Cons

- May result in consortia led by local PIC or WIB that is not effective in particular local area and therefore local entity not most effective in promoting employment opportunities for persons with disabilities.

(b). *Specify one entity as above, but allow waivers to requirement.*

Pros

- Ensures that all consortia are either led by local PIC or WIB if that local entity is effective and therefore led by local governmental entity most essential to promoting employment.

Cons

- May result in waivers based on political considerations as opposed to effectiveness considerations.

Option 2: *Allow consortium members to decide who applies for the grant.*

Pros

- Allows for greater diversity and possibly greater innovation in the designation of entity to head consortium.

Cons

- May result in consortia whose focus is not totally on promoting employment for persons with disabilities.


SOCIAL SEC

Office of the Commissioner

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<small>GENERAL SERVICES ADMINISTRATION</small>		

September 16, 1998

MEMORANDUM FOR THE HONORABLE ERSKINE B. BOWLES

FROM : Kenneth S. Apfel *Kenneth S. Apfel*
 Commissioner of Social Security

SUBJECT : Social Security Administration's Weekly Report--
 September 21 - October 2, 1998--INFORMATION

KEY AGENCY NEWS

SSA to Award Grants to States to Develop Approaches to Increase Work Opportunities for People with Disabilities: On September 18, SSA will award grants totaling \$5 million to nine States to develop innovative approaches to increase work opportunities for people with disabilities. The objectives of the grant program are to create federal/state partnerships and to provide support services to assist people with disabilities in achieving employment, including vocational training, health care services, and transportation assistance. The Vice President will announce these grants for SSA as part of a Town Hall event that day.

Social Security Advisory Board: On September 22 - 23, the Social Security Advisory Board will hold public hearings in Dallas, TX. The subject will be "Service to the Public."

OTHER AGENCY NEWS

SSA Receives John N. Sturdivant National Partnership Award: SSA was one of four agencies honored by receiving the 1998 John N. Sturdivant National Partnership Award. This annual award, first presented by Vice President Al Gore and renamed this year to honor the late John N. Sturdivant, former President of the American Federation of Government Employees (AFGE), recognizes achievements of labor-management partnerships working together to create a Government that works better and costs less. SSA's National Partnership Council (NPC) and its Partnership Evaluation Team were recognized for efforts made by the Agency and the AFGE in conducting a nationwide evaluation of its partnership activities. The NPC team was the first to issue a report involving an agency-wide evaluation of the effects of partnership on agency performance and is serving as a benchmark for

organizations considering assessment of their partnership activities.

Hammer Award Ceremony: On September 24, Commissioner Apfel will present the Vice President's Government Reinvention "Hammer" award to approximately 300 SSA employees who have developed new and creative ways to perform important governmental functions. These employees represent nine teams that have worked on a variety of projects including development of an automated notice to send to widow(er)s before age 65 to let them know of their potential eligibility for higher benefits, and a project in which Mississippi field office employees developed a package of services that helped to increase the Mississippi Band of Choctaw Indian's educational awareness of Social Security programs.

CONGRESS

Hearing on the Security of Government Computer Systems: On September 23, The Senate Committee on Governmental Affairs (Chairman Thompson) will hold a hearing on the security of government computer systems. John Dyer, SSA's Principal Deputy Commissioner, will testify for SSA. Other scheduled witnesses include representatives of the General Accounting Office and the Department of Veterans Affairs.

COMMISSIONER'S SCHEDULE

No travel scheduled for this period.

OTHER SIGNIFICANT MEETINGS AND CONFERENCES

On September 21 - 24, Yvette Jackson, SSA's Deputy Commissioner for Finance, Assessment and Management, will be in London, England where she will participate in discussions of SSA's electronic funds transfer and automated clearinghouse (ACH) initiatives with senior officials at Bankers Automated Clearing Services (BACS) and the British Social Security System. BACS is the British equivalent of this country's national ACH system.

On September 24, Carolyn Colvin, SSA's Deputy Commissioner for Operations, will be in New York, NY where she will be a guest on OPTV's cable television series, "Social Security and You." The live-on-tape program, a monthly half-hour show, will focus on solvency and customer service and will be carried by over 95 cable television stations throughout New York, New Jersey, Puerto Rico and the Virgin Islands. Ms. Colvin will also participate in a town hall meeting with over 100 community advocates and leaders. The meeting will focus on current issues related to nonqualified alien legislation, service delivery, and Social Security solvency.

14 September 98

TO: CECILLIA ROUSE & CYNTHIA RICE

FROM: JUDITH E. HEUMANN & CURTIS RICHARDS

RE: OPTIONS FOR "BRIDGE" PROGRAM EVALUATION

ISSUE:

How should grantees under the proposed Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE) Program be evaluated?

BACKGROUND:

The Department of Education and the Social Security Administration are conducting separate, but coordinated, competitions to fund model demonstration projects of program coordination and systems change designed to increase employment outcomes for individuals with disabilities. The Social Security Administration soon will be awarding a contract to conduct an evaluation of these demonstration projects.

The evaluation will include two site visits to each project per year in order to evaluate the way the State Projects are organized, monitor record-keeping, provide guidance and technical assistance, and identify the elements of the demonstration that lead to positive work outcomes for beneficiaries. The primary goal of the evaluation is to analyze the systems which State Projects develop to streamline employment and rehabilitation services and other supports. The second related component is to measure the outcomes for participants and describe how changes in the infrastructure of each of the State's service delivery systems lead to these outcomes.



OPTIONS FOR CONSIDERATION:

Building on these demonstration efforts, the Task Force on the Employment of Adults with Disabilities is proposing a similar, but much more significant, FY 2000 initiative known as the Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE) Program. An evaluation component of this program will be critical. Below are a few options for consideration as the BRIDGE Program takes shape.

- 1) *Longitudinal Study:*** This option would require four waves of data collection on a statistically significant sample of individuals served by each project. The first wave would include baseline data from each consumer regarding employment histories, enhanced data on their disabilities, additional data on current and prior receipt of services, and their expectations regarding the services they have applied for. The remaining three waves of data collection would occur one year apart and would query the consumer on their satisfaction with services and the outcomes they obtained including employment outcomes and integration into the community. During each wave, the study sample's case records would be abstracted, and project records, cooperative agreements, policies, procedures, relevant state and local legislation, etc. would be reviewed and service providers, managers, administrators, state and local decision makers and other key personnel involved would be interviewed to document the projects' systems-change, infrastructure-building, and program integration. The purpose of the interviews and records review would be to provide an analysis of what changes occurred at the state and local levels, how they were accomplished, and how they achieved, or encouraged, the achievement of consumer outcomes. Where the service model permitted, there would be random assignment of individuals to either model or conventional services to identify services' impact. There would be a comprehensive analysis of the integrated project database and relevant ancillary databases (e.g. Unemployment Insurance, etc.). This option would provide information on the impact of services at project or sub-project level (at least, where the services models

permitted), and comprehensive information on project evolution, services provided, and outcomes attained. This would provide the richest analytical database for subsequent decision making. It is estimated that the cost of Option 1 would be approximately \$8,000,000.

2) Longitudinal Case Studies and Comprehensive Survey: In this option, a restricted number of consumers, service providers, managers, administrators and local decision makers would be followed intensively for four years and their experiences would be documented in-depth. Relevant supporting records would be reviewed. This would produce a series of intensive case studies for each project. In the fourth year, a comprehensive survey would be conducted with a statistically significant number of consumers and interviews would be conducted with relevant providers, managers, administrators local decision makers, etc.. Case and project records, cooperative agreements, state and local legislation, etc. would be reviewed, and the integrated project databases and ancillary databases would be comprehensively analyzed. This option would provide qualitative (but non-generalizable) data on the projects' evolution, processes, and consumer experiences through the case studies. It would also provide a comprehensive retroactive examination of project processes, services and outcomes. This option would not contain optimal service impact measurement methods, but it would still provide a relatively rich analytical database. It is estimated that the cost of Option 2 would be approximately \$6,000,000.

3) Comprehensive Survey: In this option, the projects would be monitored through three annual site visits. Unstructured interviews would be conducted with small numbers of consumers, service providers, managers administrators, state and local decision makers and other personnel involved in the projects.. Project records, policies, procedures, cooperative agreements and reports would be reviewed. In the fourth year a: 1) comprehensive survey would be conducted, and 2) comprehensive analysis of the integrated database and ancillary databases would be

implemented per Option 2. This option would provide very useful data and analyses, but the data analyses would not be as compelling as those derived from Options 1 and 2. It is estimated that the cost of Option 3 would be approximately \$2,000,000.

As a condition for receiving grants, all applicants should agree that they will adopt computerized, integrated data systems with key data identical across all projects, and grant funds should support the development and implementation of such systems. The computerized data systems should include: a) uniform (for all projects) case record data on each person served including characteristics of individuals served, services provided, service costs, and employment outcomes and b) a real-time tracking system so the individual's trajectory through the integrated, coordinated service system can be documented along with the support services provided and those service costs. These data systems should include links to other key databases including Welfare, JTPA, Unemployment Insurance, etc. Moreover, at the project level (which transcends the case level) a uniform taxonomy of services should be adopted by all projects as well as uniform methods of accounting for key costs - particularly overhead costs.

Add: why needed w/ One Stops
= how will interact w/ One Stops

DRAFT September 14, 1998

Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE)

Introduction

On March 13, 1998, the President issued Executive Order No. 13078 entitled "Increasing Employment of Adults with Disabilities" to increase the employment of adults with disabilities. The Executive Order directed federal agencies and departments to create a coordinated and aggressive national policy to accomplish that goal. As part of the effort to fulfill the President's mandate, the Departments of Labor, Education, Transportation, Commerce, and Health and Human Services, along with the Social Security Administration, Small Business Administration, and Veterans Affairs, are propose the "Building Resources for Individuals with Disabilities to Gain Employment" ("BRIDGE") Program.

BRIDGE will help to increase the employment rate of adults with disabilities by fostering integration of employment-related services and support services to adults with disabilities among state and local disability systems *at the point of delivery*. Through competitive grants, BRIDGE will help people with disabilities access all of the services they need to find and keep employment through a single point of entry, rather than having to sort through a dizzying bureaucracy on their own. BRIDGE will also foster effective integration of service delivery that will continue well beyond the life of the grants.

Background

According to the 1998 Harris Survey of Americans with Disabilities, two-thirds of individuals with disabilities between the ages of 16 and 64 are not working. Only three in ten working-age adults with disabilities are employed full or part-time. Seventy-five percent of those non-employed adults with disabilities have indicated that they would prefer to be working (Harris Survey, 1998.) The vast majority of these individuals receive income support and other services through federal, state, and local programs like Temporary Aid to Needy Families (TANF), Supplemental Security Income (SSI), Social Security Disability Income (SSDI), Medicaid (including Medicaid waiver programs), Medicare, mental health services, vocational rehabilitation, subsidized housing, and food stamps.

Even though legislation, technology, and changes in societal attitudes have improved the environment for employment, fewer than 1% per year of the eight million SSI and SSDI beneficiaries actually return to work and terminate benefits. In fact, over the past decade, the total number of SSI and SSDI disability beneficiaries has doubled and federal cash payments to these individuals have steadily increased to more than \$75 billion annually (SSA, 1998). The costs of related Medicaid coverage also continues to escalate. These figures will continue to increase dramatically with the increased incidence of disability in an aging population, and the migration of many Temporary Aid to Needy Families (TANF) recipients with disabilities from welfare to SSI/SSDI roles.

The Policy Problem

People with disabilities are a diverse population requiring a variety of services and supports to find and keep seek or retain employment. While a host of services and supports are currently provided by government, programs are dispersed between numerous departments and agencies. In addition, states and localities vary enormously in the structure, availability and effectiveness of their employment, health care, and other human services and support programs. The current fragmented approach to supplying these needed services and programs has rendered them less effective in assisting adults with disabilities in finding and maintaining competitive employment. In addition, while the programs are intended to accomplish the same outcome --- that is, employment for adults with disabilities --- they frequently do not work well together in a common mission.

For example, adults with disabilities experience difficulty obtaining reliable information about employment opportunities and services, various work incentives, the myriad of state health care benefits under Medicaid, and the impact of work on their federal benefits status for SSI, SSDI, Medicaid and Medicare.

Lack of service coordination and integration results in negative consequences for employers and service providers, both public and private. Most important, they do not have ready access to skilled and effective workers with disabilities. But they also find their effort frequently wasted. For example, in some states, job counselors do not have access to job listings from agencies that administer employment and training programs. In addition, many different service providers (a vocational rehabilitation counselor, an employment training specialist, a supported employment job developer, or a representative from Projects With Industry) may all be independently contacting the same employer to develop employment opportunities for persons with disabilities. This results in duplication of effort, confusion, and complications in the relationship between the service providers and employer; the very relationship that is often critical to employment success.

Current Efforts

Currently the Social Security Administration, and the Departments of Labor, Education, and Health and Human Services have grants programs to develop and evaluate models of program coordination, service/systems integration and systems change to increase employment outcomes for people with disabilities at the state and local level. These agencies have published individual and joint grant announcements for competitive grant awards to be made in FY 1998.

- The Social Security Administration administers the "*Cooperative Agreements for State Projects which Increase Employment of Individuals with Disabilities Who Receive Public Support.*"

- The Department of Labor's Employment and Training Administration (DOL/ETA) administers a Disability Employment and Initiative grant program designed to support the objectives of Executive Order No. 13078
- The Department of Education's Office of Special Education and Rehabilitative Services (OSERS)/ Rehabilitation Services Administration (RSA) is administering "Systems-Change Projects to Expand Employment Opportunities for Individuals With Mental or Physical Disabilities, or Both, Who Receive Public Support."

The BRIDGE Initiative

BRIDGE will build on the grants programs described above, with a greater emphasis on single-point-of-entry or "one-stop" service for adults with disabilities seeking to find and keep a job. Each adult with a disability --- each "customer" --- seeking the services needed to succeed in competitive employment should be able learn about, receive advice about, and gain access to all of the necessary services with the least effort possible, preferably with a single call or office visit. Thereafter, each of the services provided to our customer should be sufficiently integrated with all of the other services so that they collectively accomplish the common goal of long-term employment and permanent attachment to the workforce.

BRIDGE grants would be awarded, primarily or exclusively, on a competitive basis from a national account of \$150 million in FY 2000. Grants would last for three years with funding in FY 2001 and FY 2002 being contingent upon subsequent appropriations. Current funding for traditional disability employment programs would not be supplanted by this initiative.

BRIDGE will emphasize the need to focus on the point of the delivery of services and the need to be flexible and adapt to state and local conditions. For this reason, state and local agencies will be given the greatest leeway possible to assemble and organize consortiums that best serve their populations. BRIDGE grantees would be encouraged to adopt coordinated and integrated service delivery approaches:

- establishing formal interagency work groups and alliances that include the customer perspective;
- entering into formal agreements for information exchange and coordination;
- involving employers and unions in the public and private sector in planning and designing services and systems;
- developing selected needed waivers of federal and state program requirements (e.g., Medicaid waivers and individual waivers of SSA eligibility and income requirements under SSA demonstration authority);
- developing state, local, not-for-profit and private expertise in identifying existing model employment service models and assisting individuals in the use of the myriad of programs and incentives;
- developing relevant cross-agency data analysis and comparative analysis;
- developing multi-program, multi-level evaluation capacity;

- improving and enhancing case management and supporting development of the individual's ability to self-manage program services and benefits; and
- supporting employers in the hiring, accommodation and provision of ongoing supports for workers with disabilities (as needed).

Eligible Applicants

Each applicant must be a consortium of state and/or local agencies that provide or could provide a range of supports and services to adults with disabilities which lead to finding and keeping employment. The agencies must have the legal authority to provide the services they propose. Consortia may include not-for-profit providers of employment, assistive technology, health and other related services to adults with disabilities.

Successful applicants would demonstrate that they have identified the means to integrate and coordinate the services provided across agencies and to remove barriers to employment for adults with disabilities. Successful applicants would also demonstrate that they consulted with diverse elements within the community of adults with disabilities in the planning, implementation, and evaluation of the project.

Finally, each applicant would be required to demonstrate an ability and willingness to expend some percentage of the grant funds to evaluate their coordination and integration efforts in a valid and reliable manner.

Expected Outcomes

These grants will produce a diverse array of integrated and coordinated service systems in states and local areas across the country that will effect the following. Some of the expected outcomes will include the following:

Adults with disabilities will:

- enter into gainful employment within a competitive work environment at a higher rate of pay than they do currently;
- more easily and rapidly access a wider and more diverse array of employment services resulting in efficient and rapid job placement that will improve job skills, job opportunities, job placement, and job retention for adults with disabilities;
- be more satisfied with employment and related support services;
- have more input concerning their life goals and career plans;
- have more choices with respect to employment and career decisions;
- be more readily accommodated within the work force;
- have a better understanding of work incentive provisions; and
- report that their quality of life has improved.



State and local service delivery systems will:

- be less fragmented, have improved communication across systems, and be more efficient by decreasing duplication of services;
- be more user friendly and customer oriented;
- be more cost-effective than services provided in less integrated delivery service systems;
- systematically decrease barriers to employment of adults with disabilities at state and local levels (e.g. lack of: transportation, health care/insurance, education, workforce training, housing, assistive technology, civil rights, on-site and off-site job accommodations and long-term follow-along supports);
- increase the use of Medicaid waivers and individual waivers of SSA eligibility and income requirements; and
- realize substantial cost savings in terms of reducing the costs of public benefit programs.

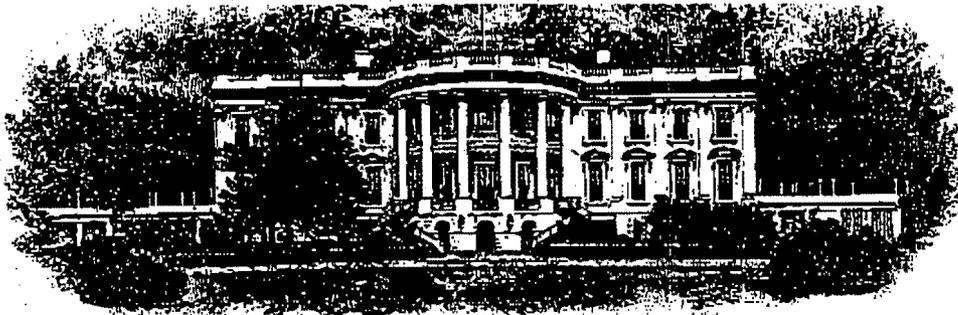
9/18
BRIDGE

One Stop

- colocation + upfront services

supermarket
of services

but not systems integration



THE WHITE HOUSE

CECILIA ROUSE
SPECIAL ASSISTANT TO PRESIDENT
NATIONAL ECONOMIC COUNCIL
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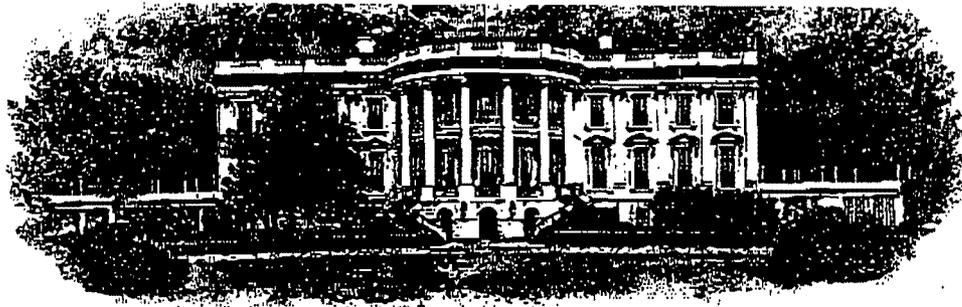
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MEETING NOTICE - THE PURPOSE OF THIS MEETING IS TO CONTINUE OUR DISCUSSION OF THE BRIDGE PROGRAM, PROPOSED BY THE PRESIDENT'S TASK FORCE ON EMPLOYMENT OF ADULTS WITH DISABILITIES. (WHICH SHOULD BE ATTACHED.) THANK YOU.

Call Sonyia at 456-5351 if this fax is incomplete and to give clearance info.

Oops
This meeting will be Wed, Sept 9th
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THE WHITE HOUSE

**CECILIA ROUSE
SPECIAL ASSISTANT TO PRESIDENT
NATIONAL ECONOMIC COUNCIL
(202) 456-5359 (Tel.)
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MEETING NOTICE - THE PURPOSE OF THIS MEETING IS TO CONTINUE OUR DISCUSSION OF THE BRIDGE PROGRAM, PROPOSED BY THE PRESIDENT'S TASK FORCE ON EMPLOYMENT OF ADULTS WITH DISABILITIES. (WHICH SHOULD BE ATTACHED.) THANK YOU.

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DRAFT September 2, 1998

Building Resources for Individuals with Disabilities to Gain Employment (BRIDGE)

"...We must forge a national disability policy that is based on three simple creeds-inclusion, not exclusion; independence, not dependence; and empowerment, not paternalism . . ."

*President Bill Clinton
1996*

Introduction

On March 13, 1998, the President issued an Executive Order entitled "Increasing Employment of Adults with Disabilities" with the goal of increasing the employment of adults with disabilities to a rate that is as close as possible to the employment rate of the general adult population. The Executive Order called for the Federal Government to create a coordinated and aggressive national policy to reduce the unemployment rate of individuals with disabilities and to assist those individuals in obtaining competitive jobs. To accomplish this goal, the Labor Department, Education Department, Social Security Administration, Small Business Administration, Transportation Department, Commerce Department, Health and Human Services Department, and the Veterans Affairs Departments are proposing an initiative called "Building Resources for Individuals with Disabilities to Gain Employment" ("BRIDGE") Program.

The purpose of this proposed grant program is to increase the employment rate of adults with disabilities by fostering the development of consortiums among state and local disability service systems or programs that promote full integration of employment-related services and support to adults with disabilities. The work of the consortiums would be to identify and eliminate conflicting policies and programmatic barriers, and to create policies and programs that integrate service delivery systems and the support services needed to obtain and maintain employment.

Background

According to the 1998 Harris Survey of Americans with Disabilities, two-thirds of individuals with disabilities between the ages of 16 and 64 are not working. Only three in ten working-age adults with disabilities are employed full or part-time. And, of the non-employed, 75% have indicated that they would prefer to be working (Harris Survey, 1998). Most importantly, the numbers of working age adults with disabilities who are not employed have not increased in the past 10 years. The vast majority of these individuals receive income support and other services through programs funded at the federal, state, and local level, and often at all three levels. Examples of these programs include Temporary Aid to Needy Families (TANF), Supplemental Security Income (SSI), Social Security Disability Income (SSDI), Medicaid (including Medicaid waiver programs), Medicare, subsidized housing, and food stamps.

Despite the increase in potential for employment -- created by legislation, technology,

and changes in societal attitudes -- only a small percentage of adults with disabilities on public benefit programs actually leave these programs for employment. For example, over the past decade, the total number of SSI and SSDI disability beneficiaries has doubled to more than eight million working age individuals. Federal cash payments to these individuals have steadily increased to more than \$75 billion per year (SSA, 1998). Yet, annually, fewer than 1% of the eight million SSI and SSDI beneficiaries actually return to work and terminate benefits.

The Policy Problem

"...Eligibility is linked to SSDI and gross earned income qualifying determinations. Either I have it or I don't...Incredibly, despite these kinds of requirements, there is no such thing as Federal or State accounting assistance for working benefit recipients! Government representatives . . . deal with only one program per letter, and nothing ever gets comprehensively integrated . . ."

*Phil Schultz, SSDI beneficiary
Racine, Wisconsin*

People with disabilities are a diverse population, they need a variety of services and supports to seek or retain employment and federal assistance is dispersed between many programs and agencies. In addition, states and localities vary enormously in the structure, availability and effectiveness of their employment, health care, and other human services and support programs. Lack of information and poor integration of public support programs causes program-related barriers and complexities that inhibit individuals with disabilities from effectively using available services. From the individual's perspective, public programs make no sense, are too complex, have conflicting rules and goals and work at cross-purposes much of the time.

There is also limited information sharing and/or program coordination by federal administrators with their counterparts at other federal, state, local, and nonprofit agencies, and with the private sector or with the disability community. The consequence of this is evidenced in the difficulty adults with disabilities experience in getting reliable information about the various work incentives, the myriad of state health care benefits under Medicaid, and the impact of work on their federal benefits status for SSI, SSDI, Medicaid and Medicare.

Lack of service coordination and integration also has negative consequences for employers and service providers, both public and private. For example, in some states, counselors do not have access to job listings from agencies that administer employment and training programs. In addition, many different service providers (a vocational rehabilitation counselor, an employment training specialist, a supported employment job developer, or a representative from Projects With Industry) may all be independently contacting the same

employer to develop employment opportunities for persons with disabilities. This results in duplication of effort, confusion, and complications in the relationship between the service providers and employer; the very relationship that is critical to employment success.

Clearly programs and agencies need to coordinate, by sharing basic program information, establishing compatible eligibility criteria, and cooperating in service provisions.

Current Efforts

Currently the Social Security Administration, and the Departments of Labor, Education, and Health and Human Services have discretionary and demonstration grant initiatives to develop and evaluate models of program coordination, service/systems integration and systems change to increase employment outcomes for people with disabilities at the state and local level. Much of this effort is focused on beneficiaries of federal SSI and SSDI programs.¹ These agencies have published individual and joint grant announcements for competitive grant awards to be made in FY 1998 (less than \$8 million total for projects in 4-6 states).

The following five examples of proposed projects under the current demonstration grants initiative at the Social Security Administration provide insight into different approaches to addressing employment barriers experienced by certain SSA beneficiaries. (Applicants are not identified because the SSA awards have not yet been announced. These examples do not necessarily represent the grand award recipients.)

1. Project #1 proposed to involve three of 28 existing Department of Rehabilitation/Mental Health Cooperative Project sites, by adding services for at least 200 individuals with severe psychiatric disabilities each year at sites that have One-Stop Career Centers. The sites will enhance services by adding two staff positions: a Benefits Coordinator and a Service Coordinator. The service delivery to the individual will use a team approach with representatives of SSA, VR, MH, and other relevant agencies. At the state level, a State Coordinating Council will seek waivers from SSA, HCFA, and perhaps others (i.e., HUD). The waivers will be used to pilot ways to encourage adults with disabilities to work and be less dependent on public assistance.

2. Project #2 proposed to address barriers created by the fear of losing public health insurance and income supports experienced by beneficiaries who are mentally ill, mentally retarded, and developmentally disabled. Barriers will be addressed through education of SSA beneficiaries who are VR clients on available work incentives, promotion of VR services, and the use of a Medicaid Earned Income Disregard Waiver and an SSA Waiver to Suspend the Extended Period

¹ There is also a similar ongoing multi-year health care project sponsored by the Robert Wood Johnson Foundation (RWJ).

of Eligibility.

3. Project #3 proposed to integrate current workforce development efforts in ways that increase efficiency of operations, enhance program quality and outcomes, and ultimately increase the employment and wages of beneficiaries with serious mental illness in meaningful jobs. The proposal will request waivers from HCFA, SSA, and HUD. Employment services will be integrated through One-Stop Career Centers, a centralized location that can simplify the service interface for consumers. The project will also explore new structures such as "Consumer Credit Unions" to help solve the complicated financial problems of consumers. The project also projects two regional pilots to test employment vouchers in years 3-5 of the funding.

4. Project #4 proposed to use interventions in two cities to increase employment and decrease reliance on public supports. A third comparable city will be selected to collect control group data. The project plans to serve SSI/SSDI beneficiaries who have severe and persistent mental illness and are served by DVR; who are blind or visually impaired, and are served by the Division of Services for the Blind; and consumers who have physical disabilities that might be able to transition to employment through the Independent Living Program (ILP). The main approaches will be to reduce uncertainty regarding the effect of increased wages on benefits and streamlining access to employment supports and services through use of Benefit Counselors, increasing incentives for working via waivers regarding SSI related benefit reductions, ensuring health care by targeting employers who provide health benefits, and providing specific training to make participants attractive to those employers.

5. Project #5 is the product of five years of study and pre-testing. To continue its work in this area, this project, coordinated through a state health agency, proposed to provide 1,800 SSI/SSDI beneficiaries with physical disabilities, mental illness, developmental disabilities, and AIDS/HIV with comprehensive help in securing and maintaining gainful employment. It will make better use of existing SSI/SSDI work incentives and add new assurances of health and long term care coverage regardless of earnings. It will reduce fragmentation and assure participants are better off financially as a result of employment.

The BRIDGE Initiative

The new BRIDGE grant program builds on the current efforts of the federal agencies, described above. It would begin by providing all interested applicants intensive orientation to the relevant federal programs and technical assistance on the flexibility in federal programs, including the ability to obtain waivers and develop options specific to the state or local community. It would then support a much greater number of states and localities in the planning, creation and early implementation of integrated and coordinated service delivery at the state and local levels. Projects would be designed to put into practice the best approaches to competitive employment of adults with disabilities and take into account the economic, educational, health, and public policy environment in the state or locality in question.

How many will this fund? Every state? Several per state?

BRIDGE grants would be awarded, primarily or exclusively, on a competitive basis from a national account of \$150 million in FY 2000. Grants would last for three years with funding in FY 2001 and FY 2002 being contingent upon subsequent appropriations. Current funding for traditional disability employment programs would not be supplanted by this initiative.

In order to promote coordination and integration of services, the BRIDGE program will emphasize the need to focus on the point of the delivery of services and the need to be flexible and adapt to state and local conditions. Specifically, individual programs and services would be linked by: (1) convincing service providers and officials of the need to cooperate and developing incentives for them to participate in cooperative consortiums, (2) getting key participants to agree to the goals of the initiative and the role of each entity in developing and implementing policy, program and systems changes, and (3) establishing a forum to address issues and promote change and to establish ongoing communication and integration of services. Some states have developed strategies that use this type of practical approach to improve service delivery and have reported that their coordination efforts have reduced time and expense for administrators and consumers alike. (p. 20, GAO/HEHS-96-126, 1996.)

The BRIDGE program would encourage coordinated and integrated service delivery approaches by encouraging the use of the following mechanisms by grantees:

- establishing formal interagency workgroups and alliances;
- entering into formal agreements for information sharing and coordination;
- developing needed waivers of federal and state program requirements (e.g., Medicaid waivers and individual waivers of SSA eligibility and income requirements under SSA demonstration authority);
- developing state, local and private expertise in providing employment services and assisting individuals in the use of the myriad of programs and incentives;
- improving customer information systems and customer service;
- developing relevant cross-agency data analysis and comparative analysis;
- developing multi-program, multi-level evaluation capacity;
- improving and enhancing case management and supporting development of the individual's ability to self-manage program services and benefits;
- involving employers and unions in the public and private sector in planning and design of services and systems;
- supporting employers in the hiring, accommodation and provision of ongoing supports for workers with disabilities (as needed);
- measuring inter and intra-governmental cost-savings of return-to-work activities;
- measuring customer satisfaction;
- evaluating the impact of work on other social factors (quality of life, community participation, recreation, health status, etc.);
- evaluating effectiveness and efficiency of interventions.

Eligible Applicants

Applicants must demonstrate that they represent a consortium of state and/or local agencies that provide or could provide a range of supports and services to adults with disabilities which lead to identification, access and maintenance of employment. The public agencies should have the legal authority to provide the services they propose. Consortia may include not-for-profit providers of employment, assistive technology, health and other related services to adults with disabilities.

For example, a consortium could consist of a local Private Industry Council, the local Small Business Administration office, the local metropolitan planning organization, the state vocational rehabilitation agency, the local One-Stop office, the local school district, the state Medicaid program office and, if appropriate, agencies providing access to the Medicare program. Successful applicants would demonstrate that they have identified the means to integrate and coordinate the services provided across disciplines and to remove barriers to employment for adults with disabilities. The consortium must also demonstrate that it has consulted with diverse elements within the community of adults with disabilities in the planning, implementation, and evaluation of the project.

Finally, each applicant would be required to demonstrate an ability and willingness to expend some percentage of the funds provided to evaluate customer satisfaction and the efficiency and effectiveness of their coordination and integration efforts in a valid and reliable manner.

Expected Outcomes

These grants will produce a diverse array of integrated and coordinated service systems in states and local areas across the country. Some of the expected outcomes will include the following:

Adults with disabilities will:

- enter into gainful employment within a competitive work environment at a higher rate of pay than they do currently;
- more easily and rapidly access a wider and more diverse array of employment services resulting in efficient and rapid job placement that will improve job skills, job opportunities, job placement, and job retention for adults with disabilities;
- be more satisfied with employment and related support services;
- have more input concerning their life goals and career plans;
- have more choices with respect to employment and career decisions;
- be more readily accommodated within the work force;
- have a better understanding of work incentive provisions; and

Should P. arrange yours to more ~~are~~ order

* HUD should be part of process
+ EEOC + Justice

"due to" or "in part to"

report that their quality of life has improved.

→ Judiciary = two commonly asked Qs of employers
re: ADA etc.

State and local service delivery systems will:

- be less fragmented, have improved communication across systems, and be more efficient by decreasing duplication of services;
- be more user friendly and customer oriented;
- be more cost-effective than services provided in less integrated delivery service systems;
- systematically decrease barriers to employment of adults with disabilities at state and local levels (e.g. lack of: transportation, health care/insurance, education, workforce/training, housing, assistive technology, civil rights, on-site and off-site job accommodations and long-term follow-along supports);
- increase the use of Medicaid waivers and individual waivers of SSA eligibility and income requirements; and
- realize substantial cost savings in terms of reducing the costs of public benefit programs.

Outstanding Administrative and Policy Issues to be Decided

state consortia
and
state-local
consortia

1. Which federal agency or agencies will administer the grant program?
(Which agency or agencies will receive the funding in the President's budget?)

JOL ✓ 2. Which federal agencies' local affiliates/systems must participate in a consortium for it to be a qualified applicant? *Curmudgeon: requires 5 agencies*

3. What is an appropriate amount for a grant, in terms of a capped or a floor-funded program?

Andy * 4. Should grants be given out exclusively on a competitive basis, or should there be a formula component to assure that every state participates in this activity? For example, should some portion of the money be given to states or cities by formula and the remaining given to local consortiums by competition? *should consortia be required to serve entire disability community? or are targeted applications allowed?*

Judith 5. How will the grantees be evaluated? *Is late behavior creaming? Formula + compet.*

6. Should there be a reward for achieving certain outcomes?

SELH * 7. What are consortia applicants required to do? *disability activities*
DOL 8. What is match of any? *Pres. Tad Fore*

Daniel SSA (8) *had appl 27 states*

Heuman Dept of Ed (2) *now running joint program*

~ \$500,000 grant

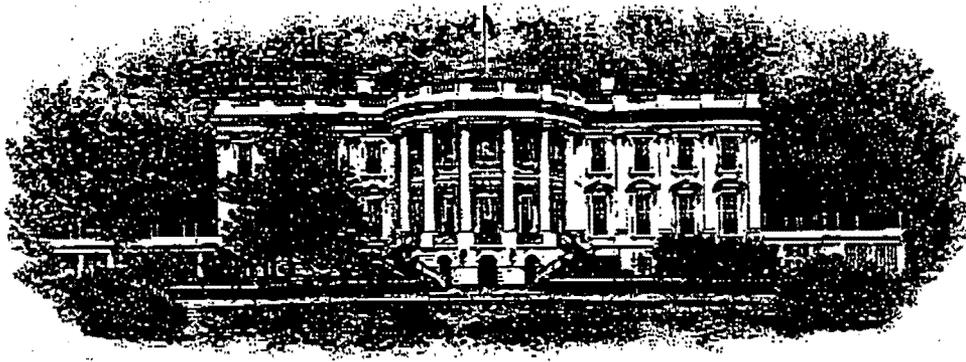
Givns exec order

Howard (on duty from ed)
Moses
219-6001 x144

Bill McKinnon
219-6001 x179

10. Relationship of caret program

* options paper



THE WHITE HOUSE

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COMMENTS: _____

Here are background papers for tomorrows BRIDGE Program meeting at 2:00 pm in room 239 OEOB. (2 memo's, Target population Issues, Options for defining the consortium, BRIDGE draft paper.) Thanks.

Call Sonyia at 456-5351 if fax is incomplete.