

2013 DRAFTING REQUEST

Bill

Received: **9/23/2013** Received By: **tdodge**
Wanted: **As time permits** Same as LRB:
For: **Joe Sanfelippo (608) 266-0620** By/Representing: **Joshua Hoisington**
May Contact: **Legislative Council - Mary** Drafter: **tdodge**
Subject: **Mental Health - miscellaneous** Addl. Drafters:
Extra Copies:
Submit via email: **YES**
Requester's email: **Rep.Sanfelippo@legis.wisconsin.gov**
Carbon copy (CC) to: **tamara.dodge@legis.wisconsin.gov**

Pre Topic:

No specific pre topic given

Topic:

Supportive employment for individuals with mental illness

Instructions:

See attached

Drafting History:

<u>Vers.</u>	<u>Drafted</u>	<u>Reviewed</u>	<u>Typed</u>	<u>Proofed</u>	<u>Submitted</u>	<u>Jacketed</u>	<u>Required</u>
/?	tdodge 10/7/2013			_____			
/P1	tdodge 10/10/2013	csicilia 10/11/2013	jfrantze 10/11/2013	_____	sbasford 10/8/2013		State
/1				_____	sbasford 10/11/2013	lparisi 10/18/2013	State

FE Sent For:

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At
Intro.

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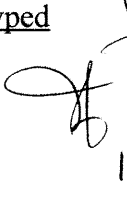

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Dodge, Tamara

From: Hoisington, Joshua
Sent: Monday, September 23, 2013 10:57 AM
To: Dodge, Tamara
Cc: Matthias, Mary
Subject: Bill Draft
Attachments: 2341_001.pdf

Good Morning Tammy,

Please draft a bill going with option B in the attached memo. Also, please include the details suggested from Bob Meyer below in regard to the “graduated outcome or incentive payments” to the sites or regions that implement new IPs programs rather than provided in full at the outset of the program.

Mary Matthias from Leg. Council will be following up with you on this matter.

Please do not share this information with anyone except for Rep. Sanfelippo’s office.

Best Regards,

Josh Hoisington
Office of Representative Joe Sanfelippo
15th Assembly District
608.266.0620

From: Matthias, Mary
Sent: Monday, September 23, 2013 10:41 AM
To: Hoisington, Joshua
Subject: FW: question regarding IPS regions

Josh-

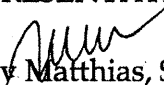
Here is more info I received from Bob Meyer at DHS after I talked to him about the regions on Friday. In addition to details about the regions, he suggests an alternative use of the funds than were proposed for pilot programs in the WCMH proposal that was sent to the Task Force. He suggests that those funds be provided as “graduated outcome or incentive payments” to the sites or regions that implement new IPs programs rather than provided in full at the outset of the program. He also discouraged lowering the amounts included in the WCMH proposal for IPS trainers and supervisors. (WCMH had them at \$75 K; in the memo I did for you, under options A and C, those amounts are reduced to \$70 K.)

Mary Matthias
Senior Staff Attorney | Wisconsin Legislative Council | 608.266.0932
<http://legis.wisconsin.gov/lc/>



WISCONSIN LEGISLATIVE COUNCIL

*Terry C. Anderson, Director
Laura D. Rose, Deputy Director*

TO: REPRESENTATIVE JOE SANFELIPPO
FROM:  Mary Matthias, Senior Staff Attorney
RE: Individual Placement and Support Proposal
DATE: September 19, 2013 (Revised September 20, 2013)

This memorandum, written at the request of your aide Josh Hoisington, describes a proposal relating to Individual Placement and Support (IPS) that you are requesting the Speaker's Task Force on Mental Health to consider for inclusion in its final recommendation.

The proposal is described in greater detail in the attachment to this memorandum, which was prepared by the Wisconsin Council on Mental Health (WCMH).

BACKGROUND

IPS is a specific type of supported employment for individuals with mental illness. It was developed at Dartmouth College Psychiatric Research Center, which conducts interdisciplinary research on services for individuals who have mental illness. According to the Dartmouth IPS website, IPS is three times more effective than other vocational approaches in helping people with mental illness to work competitively.

The eight practice principles of IPS are as follows:

1. Every person with severe mental illness who wants to work is eligible for IPS supported employment.
2. Employment services are integrated with mental health treatment services.
3. Competitive employment is the goal.
4. Personalized benefits counseling is provided.
5. The job search starts soon after a person expresses interest in working.
6. Employment specialists systematically develop relationships with employers based upon their client's work preferences.

7. Job supports are continuous.
8. Client preferences are honored.

According to the materials provided by the WCMH, there are currently nine counties in Wisconsin with an IPS site: Washington, La Crosse, Marathon, Barron, Dunn, Chippewa, Dane, Jefferson, and Lincoln.

PROPOSAL

Provide funding to: (a) create a regional infrastructure to promote implementation of IPS; and (b) provide work incentives benefits counseling, as recommended by the WCMH, and set forth in detail in the attachment to this memorandum. Please note, as described below, the funding options you have developed are slightly different than those recommended by the WCMH.

The proposed regional infrastructure would consist of regional IPS centers throughout the state. These regions would consist of: Northwestern Wisconsin, which already has an IPS site operated by the Western Regional Wellness and Recovery Consortium; (b) South Central Wisconsin, which would be served by the IPS coordinator who is under contract with the Department of Health Services (DHS) and currently serves the entire state; and (c) three new regions which would be served by the new trainer mentor and supervisor positions funded under your proposal. These three new regions would each consist of a consortium of counties. One consortium would consist of counties in Northeast Wisconsin; one would be a consortium of counties in Central Wisconsin; and the third would consist of Milwaukee, Waukesha, and Racine Counties.

Each IPS center would each house an IPS trainer/mentor and an IPS supervisor. The trainer/mentor would be available to train agencies on the IPS model, provide ongoing support to each of the IPS sites and conduct reviews of IPS programs every six months until the program achieves good "fidelity" to the research-based model. These positions could either be under contract with the regional county consortia or with DHS. According to the WCMH, the Dartmouth/Johnson and Johnson Learning Collaborative would provide training to each mentor at no cost.

In addition, competitive grants would be awarded to sites or regions for the purpose of implementing IPS and to offset initial costs while the program is developing systems for billing Medicaid and to become a Department of Workforce Development Division of Vocational Rehabilitation (DVR) service provider.

Work Incentive Benefits Counseling is a service that assists clients in obtaining work-related government benefits such as Social Security, Medicaid, and other government entitlements. According to WCMH, the fear of losing benefits is a major reason that clients may not want to seek employment. This proposal includes requested funds to support Work Incentive Benefits Counseling for individuals who are not DVR clients or who may be on a DVR wait list. WCMH states that based on information from DVR, this service typically costs

\$750 for the analysis service with a report and an additional \$450 for individuals wishing to create a plan to use work incentives.

You have developed three options for implementation of this proposal. Under **Option A**, below, total funding of \$990,000 would be provided. Of this total amount, \$210,000 would be utilized to fund three IPS training mentor positions at \$70,000 each; \$210,000 would be utilized to fund three IPS supervisors at \$70,000 each; \$450,000 would be utilized to provide nine infrastructure pilot grants at \$50,000 each; and \$120,000 would be utilized to provide work incentives benefits counseling to 100 individuals at a cost of \$1,200 per individual.

OPTION A

Category	Cost	Total
IPS Trainer/Mentor Regions (3)	\$70,000	\$210,000
IPS Supervisor Regions (3)	\$70,000	\$210,000
Infrastructure Pilot Grants (9)	\$50,000	\$450,000
Work Incentive Benefits Counseling Statewide (100 individuals)	\$1,200	\$120,000
TOTAL		\$990,000

Under **Option B**, below, total funding of \$970,000 would be provided. Of this total amount, \$225,000 would be utilized to fund three IPS training mentor positions at \$75,000 each; \$225,000 would be utilized to fund three IPS supervisors at \$75,000 each; \$400,000 would be utilized to provide eight infrastructure pilot grants at \$50,000 each; and \$120,000 would be utilized to provide work incentives benefits counseling to 100 individuals at a cost of \$1,200 per individual.

OPTION B

Category	Cost	Total
IPS Trainer/Mentor Regions (3)	\$75,000	\$225,000
IPS Supervisor Regions (3)	\$75,000	\$225,000
Infrastructure Pilot Grants (8)	\$50,000	\$400,000
Work Incentive Benefits Counseling Statewide (100 individuals)	\$1,200	\$120,000
TOTAL		\$970,000

Under **Option C**, below, total funding of \$940,000 would be provided. Of this total amount, \$210,000 would be utilized to fund three IPS training mentor positions at \$70,000 each; \$210,000 would be utilized to fund three IPS supervisors at \$70,000 each; \$400,000 would be utilized to provide eight infrastructure pilot grants at \$50,000 each; and \$120,000 would be

utilized to provide work incentives benefits counseling to 100 individuals at a cost of \$1,200 per individual.

OPTION C

Category	Cost	Total
IPS Trainer/Mentor Regions (3)	\$70,000	\$210,000
IPS Supervisor Regions (3)	\$70,000	\$210,000
Infrastructure Pilot Grants (8)	\$50,000	\$400,000
Work Incentive Benefits Counseling Statewide (100 individuals)	\$1,200	\$120,000
TOTAL		\$940,000

If you have any questions, please feel free to contact me directly at the Legislative Council staff offices.

MM:ty

Attachment

Expanding Employment Supports for Wisconsinites with Mental Illness: Individual Placement and Support (IPS)

What is the issue?

Studies indicate that 2 out of every 3 people with mental illness are interested in competitive employment, but only 1 in 10 is currently employed. Research shows that employment is a central factor in recovery.

What are the barriers to employment?

Some of the barriers include concerns about losing benefits, the lack of supported employment services, the lack of recovery oriented providers to support these goals, the need for education of employers and consumers, and limited funding for these services. The Wisconsin Council on Mental Health welcomes the opportunity to work with policy makers to address these barriers, and increase opportunities for people with mental illness to access evidence based employment services and supports and pursue competitive employment.

IPS – Individual Placement and Support—is an evidence-based model that addresses many of these barriers and has had some promising initial success in Wisconsin.¹⁷

What is IPS – Individual Placement and Support?

IPS is an evidence-based practice approach that was developed to help promote the recovery of people who have serious mental illness through competitive jobs related to their employment preferences. There have been 16 randomized controlled trials (the gold standard in medical research) for IPS supported employment. In those trials, people who received IPS services were almost three times more likely to work in competitive employment than those who received other types of vocational services.

The following are the IPS Supported Employment Practice Principles:

- Employment specialists help people find regular jobs in the community (competitive employment). This is defined as a job that anyone in the community can apply for, not a job designated for people with disabilities.
- Every person who is interested in work is eligible for services regardless of symptoms, substance use disorders, treatment decisions, personal presentation, perceived job readiness or any other factor.
- Employment services are integrated with mental health treatment in a team approach. IPS staff meets with mental health practitioners on a regular basis to discuss strategies for success. For example, a case manager might help someone open a bank account to cash paychecks. A psychiatrist might make a medication adjustment to reduce fatigue at work.
- Personalized work incentives benefits planning is provided.
- The job search begins soon after a person expresses interest in working.
- Employment specialists develop relationships with employers by learning about their business needs. In this way, IPS program staff becomes a trusted resource to employers in meeting their staffing needs.

¹⁷ While we support IPS because of its evidence base, the current infrastructure in Wisconsin and the outcomes we have seen, we recognize that IPS—like any model—will not work for everyone. Some individuals with mental illness may not be eligible for the psycho-social rehabilitation services through which IPS is currently offered, may not have access to these services in their area or may not choose to use these services. Some may prefer other approaches. In the long run there will need to be a continuum of employment support options to best address the varied needs of consumers.

- Individualized job supports are time unlimited.
- Client preferences for jobs, and preferences for service delivery, are honored. For example, if someone did not want to work in food service, but there were multiple positions open near their home, the IPS staff would not push the person to apply.

Is IPS Effective?

Work is a vital therapeutic tool and it is also cost effective. Several studies have found a reduction in community mental health treatment costs for supported employment clients, while other studies have found a reduction in psychiatric hospitalization days and emergency room usage after enrollment in supported employment.

The literature suggests that, "... average per client annual cost to the Wisconsin Vocational Rehabilitation (VR) program (for IPS) is \$3,565 for individuals with 'significant' disabilities and \$3,932 those with the 'most significant' disabilities" (Salkever, 2010, p. 7). This creates a median average of \$3,748 annually/per client for IPS services in Wisconsin claimed through vocational rehabilitation (VR). **Given both the therapeutic and cost effectiveness of IPS, expansion in Wisconsin should be a priority.**

IPS In Wisconsin

Currently there are eight counties in Wisconsin delivering the IPS model through their delivery of care in the Community Recovery Services (CRS) benefit, Community Support Program (CSP), and/or Comprehensive Community Services (CCS) in conjunction with the Division of Vocational Rehabilitation (DVR).

Background:

The IPS Program in Wisconsin started in 2010, as a participant in the Johnson & Johnson Learning Collaborative. This started with a partnership and an Memorandum of Agreement between the Division of Mental Health and Substance Abuse Services and the Department of Vocational Rehabilitation (DVR) to work together to provide support for and to implement IPS services to consumers in Wisconsin. This partnership with DVR has built bridges between the two agencies to help support individual's employment and educational goals. Most recent data from DVR indicated that the percent of successful closures for individuals with a primary diagnosis of mental health concerns went from 33% in 2009 to 46% in 2012. Closures of DVR cases for individuals with mental illnesses have historical been the lowest of all disability groups.

Development:

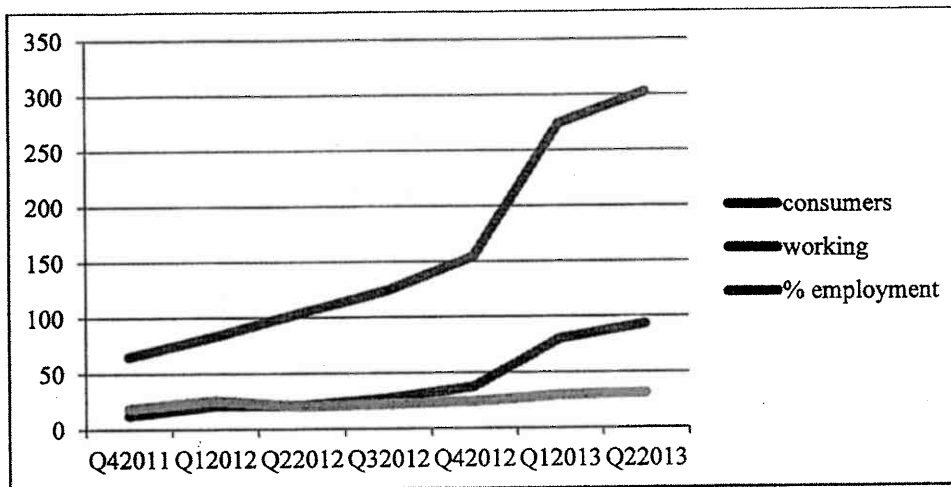
2010-2012: Three pilot sites selected in Washington, La Crosse and Marathon County.

2011: By the end of 2011, the three sites were working with 65 people and 12 had worked a job in the last quarter (18% employment rate).

2012: By the end of 2012, the number of participants rose to 154, with 37 working a job (24% employment rate).

2013: Currently, there are 9 sites around the state with 302 consumers and 93 people who had worked in the second quarter of 2013 (31% employment rate).

This graph tracks these increases:



Where are IPS sites in Wisconsin?

- Funded by the Western Regional Wellness and Recovery Consortium: Barron, Dunn, Chippewa, Eau Claire counties
- Funded by the Johnson and Johnson grant: La Crosse, Marathon, Washington counties
- Funded by CRS (1915i): Dane and Jefferson counties
- Planning stages: Pierce, Buffalo, Pepin, Washburn, St. Croix, Polk, Outagamie, Milwaukee (several sites)

The success of IPS is most meaningfully shared by hearing from some of the participants. **PLEASE SEE THE APPENDIX FOR PERSPECTIVES FROM SEVERAL WISCONSITES WHO HAVE PARTICIPATED IN IPS.**

How can we expand IPS?

- 1) **State investment in Comprehensive Community Services (CCS) is an excellent first step!**
The components of IPS are covered services in CCS. Currently the number of participants in CCS programs using IPS is relatively small. However, Governor Walker's investment in CCS in the state budget has the potential to make CCS available statewide and with it to dramatically increase access to employment services and supports for people with mental illness, including IPS.
- 2) **Increased funding for IPS infrastructure:** To ensure a successful expansion of IPS, Wisconsin will require an adequate support and oversight infrastructure. This includes reviews by IPS state trainers every 6 months until the site achieves good "fidelity" to the research-based model. This ensures that the program remains cost-effective. Given the plan to move to the regionalization of mental health service delivery in the State of Wisconsin, we recommend the creation of regional IPS centers throughout the state that would house an IPS trainer/mentor and an IPS supervisor. The trainer/mentor would be available to train agencies and/or systems on this IPS model, provide ongoing support to each of the IPS sites and conduct fidelity reviews.
- 3) **Increased funding for work incentive benefits counseling:** Work Incentive Benefits Counseling is a service that is an integral part of the IPS process. Employment specialists help refer clients to qualified work incentive benefits providers to access ongoing guidance regarding Social Security, Medicaid, and other government entitlements. Fear of losing benefits is a major reason that clients may not want to seek employment. This proposal includes requested funds to support Work Incentive Benefits Counseling for individuals who are not DVR clients or who may be on a DVR wait list. Based on information from DVR, this service typically costs \$750 for the analysis service with a report and an additional \$450 for individuals wishing to create a plan to

use work incentives costs. It is important to note that this would not be a workforce development investment. The state's Independent Living Agencies already have full-time work incentives benefits counselors, but could serve more people with increased funding.

- 4) **Increased mental health agency utilization of CRS funding:** IPS can also be provided through Community Recovery Services (CRS). Currently, Dane and Jefferson counties utilize CRS funding to support IPS employment services.

The following budget outlines the cost of increased funding for IPS infrastructure and work incentives benefits counseling. As you will notice, the budget does not fund the participants directly, but rather demonstrates that, in the long-term, this will be absorbed into the program's infrastructure costs.

Category	Cost	Total
IPS Trainer/Mentor regions (3)	\$75,000	\$225,000
IPS Supervisor regions (3)	\$75,000	\$225,000
Infrastructure Pilot Grants (9)	\$50,000	\$450,000
Work incentive Benefits Counseling statewide (100 individuals)	\$1200	\$120,000
TOTAL		\$1,020,000

Budget Narrative:

IPS Trainer/Mentor: The Dartmouth/Johnson & Johnson Learning collaborative would provide each mentor training at no cost. The trainer position is responsible for monitoring infrastructure grants, coordinating training with the statewide trainer, training supervisors and employment specialists on IPS practices (job development, fidelity, supervision), and conducting twice monthly face to face visits to assist IPS supervisors and site staff with implementation.

IPS Regional Supervisor: Each supervisor also has access to training by the Dartmouth/Johnson & Johnson Learning Collaborative at no cost. Their role is to develop training for individual site employment specialists, create a vocational unit and provide outcome-based supervision in accordance with the evidence-based model.

IPS Infrastructure Pilot Grants: Grants would be awarded to sites or regions to help them begin the process of implementing IPS and to offset initial costs while the program is developing systems for billing Medicaid and to become a DVR service provider. These grants would be awarded through a competitive bid process.

Work incentive Benefits Counseling-Service costs for estimated number of participants not utilizing DVR funds for this service. This is an estimate, currently 10 – 20% of consumers choose to not participate with DVR.

References

Campbell, Bond and Drake. (2011). *Who Benefits From Supported Employment: A Meta-analytic Study*. Schizophrenia Bulletin. 2011 March; 37(2): 370–380.

Salkever DS, Karakus MC, Slade EP, et al. Measures and predictors of community-based employment and earnings of persons with schizophrenia in a multisite study. *Psychiatric Services* 2007;58:315-324.

Additional references are available.

IPS Program: Family and Children's Center Community Support Program, La Crosse County
Consumer Spotlight: Tom Stolpa
Employer: Coulee Children's Center
Position: Custodian

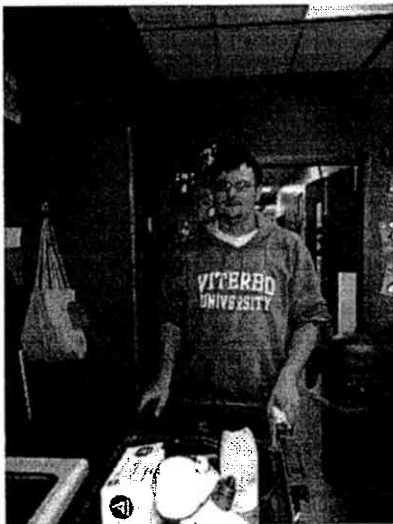
"I Did It. You can too."

Tom Stolpa is a 26 year old man with a wry sense of humor, a steady job and aspirations to get a PhD degree. He also happens to have Bipolar Disorder and is a client of the LaCrosse County Community Support Program(CSP), located at Family & Children's Center. Tom is involved with IPS (Individual Placement and Support) Services, provided by the CSP program. This program is based on research on how to best help persons with significant mental health issues attain and maintain work. The research was conducted at Dartmouth College and the Family & Children's Center is following these practices to help clients of the CSP program work successfully in the community.

As Tom explains, work is valuable. "It builds character. Being praised by your boss for good work builds self esteem and you realize if you can do this, you can do other things too". But Tom is the first one to mention he had to fight some significant barriers in order to attain work. "My biggest downfall was me". He just wasn't able to attain a job on a payroll on his own, noting that he would share things that were not helpful during the application process. Amber Kaio, Tom's Supported Employment Specialist, provided coaching to Tom about the application and interview process. In addition, she got to know employers in the community in order to make a good job match between Tom's skills and an employer's needs. After Tom started work, Amber provided transportation and assistance in mastering his work tasks. Amber also checked in with Tom's employer, to make sure things were going well from their point of view.

Tom now works mostly on his own. He works 12 hours per week as a custodian at Coulee Children's Center in LaCrosse. One thing he takes pride in is that he is helping prevent the spread of illness among the children that receive services there, through his good work cleaning. One way work is valuable to Tom is "When you work, you have less time to think and destabilize yourself with your thoughts". In this way, Tom reports that work helps his mental health recovery.

Tom is clear that he hopes to advance his career at some point. When asked what he would tell other CSP clients about IPS Supported Employment Services, Tom says "Use this program, it will get you farther than looking for work on your own. Don't give up hope. The job market is tough but there are jobs out there. Get in somewhere and just get started. I did it. You can too".



IPS Program: Family and Children's Center Community Support Program, La Crosse County
Consumer Spotlight: Pierre Thomas
Employer: Hobby Lobby

When bowling, Pierre's face lights up with each strike he gains, often scoring above everyone. His smile is infectious as he cheers on the others, assuring them that with practice they can score even higher! Through much practice and persistence Pierre has become successful at not only bowling, but also overcoming his own barriers to become a peer to others. At work, Pierre is loved among his managers and co-workers for his good attitude and ability to focus on his tasks. Looking back a few years, Pierre admits that he never thought things could be this good for him as he has been diagnosed with Schizoaffective Disorder, Bipolar Disorder and Post-traumatic Stress Disorder.

Throughout Pierre's life, he recalls painful neglect and abuse by his mother and other family members. They did not understand his disability and often told him that he did not *have* a disability. Pierre moved away from his family in Manhattan, New York to become a part of a treatment team at Family & Children's Center of La Crosse, Wisconsin when he was twenty-three. One day, Pierre asked his case manager about looking for work. Pierre was interested in fashion and design and just simply wanted something to do with his free time. This is when Pierre was referred to the IPS supported employment program through Family & Children's Center, which integrates an employment specialist, the department of vocational rehabilitation and Pierre's clinical team. Finding a job was very difficult for Pierre in the beginning. He admits that he often felt like giving up after filling out what seemed like hundreds of applications with no results. Pierre also would get nervous when speaking with employers in interviews, stumbling on his words. In order to address these barriers, Pierre met faithfully with his employment specialist to practice interviewing, write his résumé, and find an employer that would value the skills he could bring.

There were some set-backs when Pierre would think too much about his abusive past and need to seek help at the local care center. However, Pierre did not let these set-backs keep him away from pursuing work. One day, Pierre and the employment specialist stopped in to Hobby Lobby. He learned that they were in need of people to sort the merchandise in the back and possibly put together displays in the front. Pierre was ecstatic! He wanted the job so very much and knew that he would be excellent as he had past experience. There was only one problem: the math test! As part of the application process, a math test was required that included adding, dividing and calculating percentages. Along with Pierre's diagnosis he also has a learning disability. This did not stop Pierre, but rather encouraged him to seek more help to pass the test. He attended extra classes and sought out tutoring at his school.

After a month of focused tutoring, Pierre felt that he could take on the math test. With his employment specialist at his side, Pierre struggled through the test, needing to take several breaks in order to calm his nerves. Throughout what felt like hours Pierre did not give up and never once uttered the words, "I can't". The employment specialist was allowed to help Pierre through the test but did not do any of it for him. As Pierre set his pencil down on the table he breathed a sigh of relief as well as anticipation for his score. He tapped his heel on the floor as the manager looked through his answers. "Well, you passed!" said the manager to Pierre with a pleasing smile. At once, Pierre's hands sailed up in the air as he let out a triumphant, "Yes!" After many high-fives and congratulations, Pierre walked out of Hobby Lobby an employed young man. He reports that when he is at work he doesn't think about the past and the things that make him sad. His stays at the care center have decreased and he now has money to do activities such as go to movies with friends and of course, bowling!

IPS Program: Chrysalis, Dane County

Consumer Spotlight: Karen

Employer: Taher, Inc.

Position: Cafeteria Employee

"I think with mental illness there is a stereotype that it's really nothing, but it really is something. I had been looking for a job for almost a year before I got my job. It felt great when they said; 'You're hired.' I was like WHAT?! Chrysalis provided support when I felt frustrated with the job search. My employment specialist, Hannah, and I met weekly to complete job applications and talk about my anxiety.

I am proud of myself because I am pushing myself out of my comfort zone; I am making friends and making money. My favorite thing about the job is meeting new people. It has been nice to work in a school district because people are really friendly. I also get peer support services at Chrysalis from Eric. We talk about my family situation and everyday life. It's helpful to talk to him because he has also been through some difficult things. He is someone I can talk to and relate with.

My advice to someone who has been looking for work for a long time is to stay positive and keep applying, because you never know!"



State of Wisconsin
2013 - 2014 LEGISLATURE



LRB-3218
TJD:...

PI

In: 10/7/13

Due Tues.
10/8 sometime,
if possible

RMR

PRELIMINARY DRAFT - NOT READY FOR INTRODUCTION

gjs

sa

Gen Cat

1 AN ACT ~~...~~; relating to: individual placement and support program for
2 employment of individuals who have mental illness and making an
3 appropriation.

Analysis by the Legislative Reference Bureau

This is a preliminary draft. An analysis will be provided in a subsequent version of this draft.

For further information see the *state* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

4 SECTION 1. 20.005 (3) (schedule) of the statutes: at the appropriate place, insert
5 the following amounts for the purposes indicated:

1 2013-14 2014-15

2 20.435 Health services, department of

3 (5) No Bold * MENTAL HEALTH AND SUBSTANCE ABUSE SERVICES

4 (br) Individual placement and sup-

5 port GPR B 485,000 485,000

6 SECTION 2. 20.435 (5) (br) of the statutes is created to read:

7 20.435 (5) (br) Individual placement and support. Biennially, the amounts in
8 the schedule for operating the individual placement and support program for
9 employment of individuals with mental illness under s. 46.545.

****NOTE: This appropriation allows DHS to expend the \$970,000 over the two fiscal years of the 2013-2015 biennium without requiring DHS to spend a specific amount in each biennium.

10 SECTION 3. 46.545 of the statutes is created to read:

11 46.545 Individual placement and support. (1) (a) The department shall
12 create all of the following regional centers for individual placement and support for
13 employment of individuals with mental illness.

****NOTE: Do you want to define mental illness?

- 14 1. A northwestern Wisconsin region.
- 15 2. A south-central Wisconsin region.
- 16 3. A region consisting of a consortium of counties in northeastern Wisconsin.
- 17 4. A region consisting of a consortium of counties in central Wisconsin.
- 18 5. A region consisting of Milwaukee, Waukesha, and Racine Counties.

19 (b) The department shall ensure that each county in the state is served by one
20 of the regional centers created under par. (a).

21 (c) The department may contract with existing organizations or consortiums
22 to create any regional center.

1 (2) The department shall ensure that each regional center created under sub.

✓ 2 (1) (a) has access to the services of all of the following:

3 (a) An individual placement and support trainer or mentor, who is responsible
4 for all of the following:

5 1. Monitoring infrastructure grants.

6 2. Coordinating training with the department.

7 3. Training employers on individual placement and support practices.

8 4. Conducting visits twice per month to supervisors or employees hired under
9 individual placement and support to assist with implementation of effective
10 practices.

11 5. Reviewing individual placement and support programs every 6 months until
12 the programs achieve good fidelity to the evidence-based model.

13 (b) An individual placement ^{and} support supervisor, whose ^s responsibilities include ⁱ ~~★~~
14 all of the following:

15 1. Developing training for employment specialists at work sites.

16 2. Creating a vocational unit.

****NOTE: What is a vocational unit?

17 3. Providing supervision of ^e ~~the~~ program outcomes in accordance with the
18 evidence-based model.

19 (3) The department may award grants to employment sites or regional centers
20 for any of the following activities:

21 (a) Implementing individual placement and support programs.

22 (b) Offsetting costs until ~~the~~ program is capable of billing the Medical
23 Assistance program. ^a

Dodge, Tamara

From: Matthias, Mary
Sent: Monday, September 23, 2013 4:05 PM
To: Dodge, Tamara
Subject: FW: IPS trainer salaries FYI

Tami-FYI.

Mary Matthias

Senior Staff Attorney | Wisconsin Legislative Council | 608.266.0932
<http://legis.wisconsin.gov/lc/>

From: Hoisington, Joshua
Sent: Monday, September 23, 2013 4:01 PM
To: Matthias, Mary
Subject: RE: IPS trainer salaries FYI

Ok, thank you. Can you please send that to the drafter as well?

Best Regards,

Josh Hoisington
Office of Representative Joe Sanfelippo
15th Assembly District
608.266.0620

From: Matthias, Mary
Sent: Monday, September 23, 2013 4:00 PM
To: Hoisington, Joshua
Subject: IPS trainer salaries FYI

Josh-

I was looking over my notes from my phone call with Bob Meyer on Friday. he said that the \$75 K budgeted per trainer/mentor breaks down to about \$50 K salary and the rest covers fringe benefits and travel costs. Each trainer/mentor would work with multiple sites and travel between them.

Mary Matthias

Senior Staff Attorney | Wisconsin Legislative Council | 608.266.0932
<http://legis.wisconsin.gov/lc/>

Dodge, Tamara

From: Matthias, Mary
Sent: Monday, September 23, 2013 1:17 PM
To: Dodge, Tamara
Cc: Hoisington, Joshua
Subject: Sanfelippo IPS bill draft

Hi Tami-

Below is more information on the grant program that Rep. Sanfelippo would like included in the IPS bill draft. In the original WCMH proposal, it was written up as a pilot program. But DHS has refined the concept and recommends that the funding be used instead as incentive payments that are provided to agencies that implement a new IPS program as they reach certain milestones. The entire e-mail is below.

It seems like this could be achieved by awarding grants on a competitive application basis. The draft could require an application to include detailed plans for program implementation and identify anticipated sustained funding sources, as a means to encourage good planning. If DHS awards a grant, it could be in the form of a contract that specifies that DHS will provide the grantee with payments in specified amounts when the grantee satisfies certain conditions (i.e., meets the milestones described below).

The original proposal put forward by WCMH had \$400 K total for pilot grants. The DHS incentive plan described below provides a total of \$15 K per site. If funding is kept at \$400 K, that would provide incentive funding for 26 sites. I have no idea of that is a likely number of sites, or if a smaller number is more likely and therefore grant amounts should be adjusted. I will contact DHS for more info and let you know what I hear back.

Here is what DHS suggested (I re-formatted for readability):

We think a graduated outcome or incentive payment amount per site for hitting certain milestones toward fidelity to the IPS model would be more appropriate and would encourage counties to adopt the practice in a more systematic manner. This could include the following milestone activities:

- 1) agency develops steering committee, completes agreements with DVR, becomes EN or DVR service provider, hires staff and hosts kickoff event (\$2,500)
- 2) baseline fidelity review within first 6 months of program (\$2,500)
- 3) develop action plan for improvements and hits 50% employment for a full year based on Dartmouth IPS (\$5,000) and
- 4) reaches "Good Fidelity" (score of 100 or better on Dartmouth IPS fidelity review by an independent team of trained reviewers. (\$5,000).

Within this funding, a site would be eligible for \$15,000 of outcome based incentive payments to get their program up and running and sustainable. This number could be scaled to the number of new sites per region per year. (Our experience is that it takes about two years for sites to reach sustainability.)

Mary Matthias

Senior Staff Attorney | Wisconsin Legislative Council | 608.266.0932

<http://legis.wisconsin.gov/lc/>

From: Meyer, Robert H - DHS [mailto:Robert.Meyer@dhs.wisconsin.gov]**Sent:** Friday, September 20, 2013 1:43 PM**To:** 'Barbara Beckert'; Matthias, Mary**Cc:** Shel Gross (shelgross@tds.net); Enders, Kathleen - DWD; Bright, Kenya - DHS; Lampe, Lalena F - DHS; annabelle@namiwisconsin.org**Subject:** RE: question regarding IPS regions

Hello all,

I'll be out early next week, so I'll put together a few things we all have talked about in this email. I'm in Washington County on Monday and in Chippewa County Tues and Wed, but you are welcome to call my cell phone if you need anything in the meantime: 608-556-1919

Regarding the IPS proposal for expansion statewide:

Regions would most likely be: NW WI (currently covered by trainer at UW-Stout); and statewide coordination and SW WI – including Dane covered by State Trainer based in Madison (me); NEW Positions: 1) NE WI, 2) Milwaukee, Waukesha, Racine Counties and 3) Central and Eastern WI. These regions would work with the newly forming Comprehensive Community Services (CCS) regions.

Budget:

Individual Trainer and Supervisor costs include: Salary, fringe, mileage, etc. for these positions. I would not recommend lowering that amount. The supervisor costs would eventually (after 1 – 2 years) become incorporated into the individual site budgets as these individuals would carry a caseload and be billable under Medicaid, and or agency eligible for DVR outcome payments (based on consumer outcomes). The trainer positions main function once sites reach fidelity is to maintain statewide fidelity review, data collection and training. There are examples from other states in the Dartmouth Learning Collaborative of what each state has done to maintain their IPS presence for long-term sustainability.

Pilot Grants:

In subsequent discussions with the state team members (DVR representative, Kathleen Enders) and DHS team members; the system of pilot grants for infrastructure to build sustainable IPS programs has not been as successful a model for incorporation as we had intended. We modeled this after the Dartmouth/Johnson & Johnson Learning Collaborative and now have three years of experience to back up some changes for Wisconsin. We think a graduated outcome or incentive payment amount per site for hitting certain milestones toward fidelity to the IPS model would be more appropriate and would encourage counties to adopt the practice in a more systematic manner. This could include the following milestone activities: 1) agency develops steering committee, completes agreements with DVR, becomes EN or DVR service provider, hires staff and hosts kickoff event (\$2,500) 2) baseline fidelity review within first 6 months of program (\$2,500) 3) develop action plan for improvements and hits 50% employment for a full year based on Dartmouth IPS (\$5,000) and 4) reaches "Good Fidelity" (score of 100 or better on Dartmouth IPS fidelity review by an independent team of trained reviewers. (\$5,000). Within this funding, a site would be eligible for \$15,000 of outcome based incentive payments to get their program up and running and sustainable. This number could be scaled to the number of new sites per region per year. (Our experience is that it takes about two years for sites to reach sustainability.)

The underlying assumption is that the employment specialists and eventually supervisors would be incorporated into the mental health treatment teams and would be sustainable members of the team whose time working with consumers on recovery through work would be reimbursable under Medicaid funding through the CSP and CCS teams and with the support of our partners at DVR through outcome payments for individual work related milestones.

Please feel free to contact me if you need any more information. I have copied Kathleen, Kenya, Annabelle (NAMI WI) and Lalena Lampe as they are all active participants with the WI State IPS team.

Thanks,
Bob

From: Barbara Beckert [<mailto:Barbara.Beckert@drwi.org>]
Sent: Friday, September 20, 2013 12:08 PM
To: Mary Matthias (mary.matthias@legis.wi.gov)
Cc: Meyer, Robert H - DHS; Shel Gross (shelgross@tds.net)
Subject: question regarding IPS regions

Mary,
Thank you for your call and question regarding IPS regions. I reached out to Bob Meyer who is the lead staff person at DHS and asked if he could follow up with you regarding the regions. He will be calling you or you could connect via email. Bob would also be a great resource regarding "downsizing" the budget – Rep. Sanfelippo's office had mentioned to me that Rep. Severson had asked that it come in under a million. Thanks for your help. FYI I will be in Madison this afternoon but available via email or my cell at 414-719-1034.

Barbara Beckert, Milwaukee Office Director
DISABILITY RIGHTS WISCONSIN
6737 W. Washington St., Suite 3230
Milwaukee, WI 53214
414-773-4646 Ext 15 Voice
888 758-6049 TTY
414-773-4647 Fax
barbara.beckert@drwi.org

Dodge, Tamara

From: Hoisington, Joshua
Sent: Monday, September 23, 2013 11:55 AM
To: Dodge, Tamara
Subject: FW: Bill Draft
Attachments: 2341_001.pdf

Please make the funding source to come out of the \$29 million the Guv. Allocated for mental health in the budget.

Best Regards,

Josh Hoisington
Office of Representative Joe Sanfelippo
15th Assembly District
608.266.0620

From: Hoisington, Joshua
Sent: Monday, September 23, 2013 10:57 AM
To: Dodge, Tamara
Cc: Matthias, Mary
Subject: Bill Draft

Good Morning Tammy,

Please draft a bill going with option B in the attached memo. Also, please include the details suggested from Bob Meyer below in regard to the "graduated outcome or incentive payments" to the sites or regions that implement new IPs programs rather than provided in full at the outset of the program.

Mary Matthias from Leg. Council will be following up with you on this matter.

Please do not share this information with anyone except for Rep. Sanfelippo's office.

Best Regards,

Josh Hoisington
Office of Representative Joe Sanfelippo
15th Assembly District
608.266.0620

From: Matthias, Mary
Sent: Monday, September 23, 2013 10:41 AM
To: Hoisington, Joshua
Subject: FW: question regarding IPS regions

Josh-

Here is more info I received from Bob Meyer at DHS after I talked to him about the regions on Friday. In addition to details about the regions, he suggests an alternative use of the funds than were proposed for pilot programs in the WCMH proposal that was sent to the Task Force. He suggests that those funds be provided as "graduated outcome or incentive payments" to the sites or regions

that implement new IPs programs rather than provided in full at the outset of the program. He also discouraged lowering the amounts included in the WCMH proposal for IPS trainers and supervisors. (WCMH had them at \$75 K; in the memo I did for you, under options A and C, those amounts are reduced to \$70 K.)

Mary Matthias

Senior Staff Attorney | Wisconsin Legislative Council | 608.266.0932

<http://legis.wisconsin.gov/lc/>

Dodge, Tamara

From: Hoisington, Joshua
Sent: Tuesday, October 08, 2013 5:27 PM
To: Dodge, Tamara
Subject: Fwd: IPS terms

Follow Up Flag: Follow up
Flag Status: Flagged

Sent from my Verizon Wireless 4G LTE DROID

----- Original Message -----

Subject: RE: IPS terms
From: "Stachoviak, Ryan J - DHS" <Ryan.Stachoviak@dhs.wisconsin.gov>
To: "Hoisington, Joshua" <Joshua.Hoisington@legis.wisconsin.gov>
CC:

Hi Josh –

I have an email out to our IPS lead at DHS, he will be traveling the next few days, but hopefully he can shortly provide me with some information I can send along to you. In the meantime the Dartmouth IPS Supported Employment Center provides the following definition for vocational unit.

Vocational unit: The team of employment specialists and supervisor that form the IPS team.
(<http://sites.dartmouth.edu/ips/resources/glossary-of-ips-terms/>)

I haven't come across a specific definition as to an employment site. But I will let you know if I have any additional info.

Regards,

Ryan Stachoviak, MPH
Mental Health Planner
Bureau of Prevention, Treatment & Recovery
Division of Mental Health & Substance Abuse Services
Department of Health Services
1 W. Wilson Street
Madison, WI 53707
608-261-9316
Ryan.Stachoviak@wisconsin.gov

From: Hoisington, Joshua [<mailto:Joshua.Hoisington@legis.wisconsin.gov>]
Sent: Tuesday, October 08, 2013 3:36 PM
To: Stachoviak, Ryan J - DHS
Subject: IPS terms

The two definitions I'm looking for are "vocational units" and "employments sites" in regard to IPS.

Best Regards,

Josh Hoisington
Office of Representative Joe Sanfelippo
15th Assembly District
608.266.0620

Dodge, Tamara

From: Hoisington, Joshua
Sent: Wednesday, October 09, 2013 8:10 AM
To: Dodge, Tamara
Subject: FW: IPS terms

-----Original Message-----

From: Stachoviak, Ryan J - DHS [<mailto:Ryan.Stachoviak@dhs.wisconsin.gov>]
Sent: Wednesday, October 09, 2013 8:08 AM
To: Hoisington, Joshua
Subject: FW: IPS terms

Hi Josh -

Below is additional detail regarding those definitions you requested from Bob Meyer with DHS. He is the IPS Supported Employment Trainer. I hope this information is helpful.

Regards,

Ryan Stachoviak, MPH
Mental Health Planner
Bureau of Prevention, Treatment & Recovery Division of Mental Health & Substance Abuse Services Department of Health Services
1 W. Wilson Street
Madison, WI 53707
608-261-9316
Ryan.Stachoviak@wisconsin.gov

-----Original Message-----

From: Meyer, Robert H - DHS
Sent: Wednesday, October 09, 2013 7:29 AM
To: Stachoviak, Ryan J - DHS
Subject: RE: IPS terms

Hello Ryan,

Here you go:

Vocational Unit (from Becker, 2011 - Evidence Based Supported Employment Fidelity Review Manual) "At least 2 full time employment specialists and a team leader comprise the employment (vocational) unit. They have weekly client-based supervision following the supported employment model in which strategies are identified and job leads are shared. They provide coverage for each other's caseload when needed." In Wisconsin, this takes on a variety of forms -- the rural counties in the NW corner of the state have created a distributed vocational unit where they meet face to face monthly and weekly by phone the supervisor/trainer (from UW-Stout) travels to each site weekly for in person supervision. The larger sites have stand alone vocational units as described above.

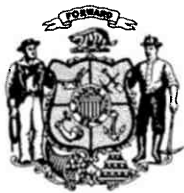
The proposal that was submitted to Rep. Sanfelippo's office, has both regional trainers and supervisors. The trainers would be similar to my position, in that they train the supervisors and conduct the fidelity reviews. The supervisors are more of the day-to-day functioning of the programs. We found it to be difficult for one person to wear both of those hats and be objective when it comes to fidelity reviews.

Employment sites: sites that are implementing IPS services and belong to the WI IPS Learning Collaborative. To belong to the collaborative sites must agree to: participate in learning collaborative training events (quarterly supervisor meetings, annual training for all staff, IPS trainings); participate in fidelity reviews by a state approved fidelity review team; submit quarterly data to the state for inclusion in the national Dartmouth/Johnson&Johnson Learning Collaborative; and have a memorandum of understanding with the Division of Vocational Rehabilitation that allows for use of the IPS - Supported Employment technical specification.

Let me know if you have any other questions. I'm on the road the rest of the week. I'll be in the office for a bit this morning to pick up materials.

Bob

Bob Meyer
IPS Supported Employment Trainer
Department of Health Services
1 W. Wilson Street, Room 951
Madison, WI 53707
Robert.Meyer@wisconsin.gov
(608) 267-7288
(608) 267-4865 (fax)



State of Wisconsin
2013 - 2014 LEGISLATURE



LRB-3218-P1
TJD:cjs:jf

In: 10/10/13

Due Fri
10/11

stays RMNR

PRELIMINARY DRAFT - NOT READY FOR INTRODUCTION

experiencing

Car Cat

1 AN ACT to create 20.435 (5) (br) and 46.545 of the statutes; relating to:
2 individual placement and support program for employment of individuals who
3 have mental illness and making an appropriation.

Analysis by the Legislative Reference Bureau

This is a preliminary draft. An analysis will be provided in a subsequent version of this draft.

For further information see the *state* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

4 SECTION 1. 20.005 (3) (schedule) of the statutes: at the appropriate place, insert
5 the following amounts for the purposes indicated:

Insert analysis

2013-14 2014-15

20.435 Health services, department of

(5) MENTAL HEALTH AND SUBSTANCE ABUSE SERVICES

(br) Individual placement and sup-	<i>and providing grants for</i>		
port	GPR	B	485,000 485,000

SECTION 2. 20.435 (5) (br) of the statutes is created to read:

20.435 (5) (br) Individual placement and support. Biennially, the amounts in the schedule for operating the individual placement and support program for employment of individuals ~~with~~ *experiencing* mental illness under s. 46.545.

****NOTE: This appropriation allows DHS to expend the \$970,000 over the two fiscal years of the 2013-2015 biennium without requiring DHS to spend a specific amount in each biennium.

SECTION 3. 46.545 of the statutes is created to read:

46.545 Individual placement and support. (1) (a) The department shall create all of the following regional centers for individual placement and support for employment of individuals ~~with~~ *experiencing* mental illness.

****NOTE: Do you want to define mental illness?

1. A northwestern Wisconsin region.
2. A south-central Wisconsin region.
3. A region consisting of a consortium of counties in northeastern Wisconsin.
4. A region consisting of a consortium of counties in central Wisconsin.
5. A region consisting of Milwaukee, Waukesha, and Racine Counties.

(b) The department shall ensure that each county in the state is served by one of the regional centers created under par. (a).

(c) The department may contract with existing organizations or consortiums to create any regional center.

LPS- please delete these notes (they are just hidden now)

1 (2) The department shall ensure that each regional center created under sub.

2 (1) (a) has access to the services of all of the following:

3 (a) An individual placement and support trainer or mentor, who is responsible
4 for all of the following:

5 1. Monitoring infrastructure grants.

6 2. Coordinating training with the department.

7 3. Training employers on individual placement and support practices.

8 4. Conducting visits twice per month to supervisors ^{or} employees hired under
9 individual placement and support to assist with implementation of effective
10 practices.

11 5. Reviewing individual placement and support programs every 6 months until
12 the programs achieve good fidelity to the evidence-based model.

13 (b) An individual placement and support supervisor, whose responsibilities
14 include all of the following:

15 1. Developing training for employment specialists at work sites.

16 2. Creating a vocational unit. ^{of employment specialists that with}
^{the supervisor comprise the individual}
^{placement and support team.}

****NOTE: What is a vocational unit?

17 3. Providing supervision of program outcomes in accordance with the
18 evidence-based model.

19 (3) The department ^{shall} award grants to employment sites ^{that are implementing individual placement}
^{and support services} or regional centers
20 for any of the following activities:

21 (a) Implementing individual placement and support programs.

22 (b) Offsetting costs until a program is capable of billing the Medical Assistance
23 program.

LPS:
please delete
this note

1 INSERT ANALYSIS

This bill requires the Department of Health Services (DHS) to create five regional centers for individual placement and support (IPS) for employment of individual experiencing mental illness. DHS must ensure that each of the state's counties is served by one of the regional centers. DHS is allowed to contract with existing organizations or consortiums to create a regional center. DHS and the regional centers must provide or arrange for work incentive benefits counseling for individuals who are not receiving vocational rehabilitation services from the Department of Workforce Development. DHS is required to award grants to employment sites that are implementing IPS services or regional centers for certain activities. The allocation for the moneys and grant awards for IPS programs for the 2013-2015 biennium is specified in the bill. ✓

Under the bill, DHS must ensure that each regional center has access to the services of an IPS trainer or mentor and an IPS supervisor. A trainer or mentor has the responsibility to monitor infrastructure grants, coordinate training with DHS, train employers on IPS practices, conduct visits twice per month to supervisors of employees hired under IPS to assist with implementation of effective practices, and review IPS programs every six months until the programs achieve good fidelity to the evidence-based model. An IPS supervisor has responsibilities that include developing training for employment specialists at work sites, creating a vocational unit that includes employment specialists, and providing supervision of program outcomes in accordance with the evidence-based models. good

(END INSERT ANALYSIS)

2 INSERT 4-6

3 SECTION 1. Nonstatutory provisions.

4 (1) INDIVIDUAL PLACEMENT AND SUPPORT FUNDING. (a) In the 2013-2015

5 biennium, from the appropriation under section 20.435 (5) (br) of the statutes, the
6 department of health services shall award grants and provide moneys for individual
7 placement and support as described under section 46.545 of the statutes to be
8 distributed in all of the following allocations:

9 1. Three individual placement and support trainers or mentors at an amount
10 of \$75,000 for each trainer or mentor with \$50,000 of each \$75,000 being the base
11 salary.

fiscal

create a.r. X

as created by this act ↑

9

create
a.r. Q

use
a.r. A

1 2. Three individual placement and support supervisors at an amount of
2 \$75,000 for each supervisor with \$50,000 of each \$75,000 being the base salary.

3 3. Infrastructure pilot grants in the total amount of \$400,000 to be distributed
4 as described in par (b). *paragraph*

5 4. Work incentive benefits counseling for 100 individuals statewide at the
6 amount of \$1,200 for each individual who is provided counseling. *paragraph*

create
a.r. A

7 (b) The department shall award the grants under par (a) 3. using a graduated *use a.r. X*
8 outcome or incentive payment schedule with all of the following amounts being *use a.r. Q*
9 awarded when the grant applicant satisfies certain criteria:

10 1. \$2,500 for each grant applicant when that applicant develops a steering
11 committee, completes agreements with the department of workforce development,
12 becomes a vocational rehabilitation service provider, hires staff and hosts an event
13 indicating readiness to provide services.

14 2. \$2,500 for each grant applicant want *when* that applicant completes the baseline
15 review within the first six *6* months of the program.

16 3. \$5,000 for each grant applicant when that applicant develops a plan for
17 improvements and achieves 50 percent employment for a full year based on the
18 program model requirements.

19 4. \$5,000 for each grant applicant when that applicant achieves good fidelity
20 with the evidence-based model.

(END INSERT 4-6)

to

Parisi, Lori

From: Hoisington, Joshua
Sent: Friday, October 18, 2013 9:16 AM
To: LRB.Legal
Subject: RUSH Draft Review: LRB -3218/1 Topic: Supportive employment for individuals with mental illness

RUSH

Please Jacket LRB -3218/1 for the ASSEMBLY.