How Blended, Braided or Sequenced Funding Can Help Drive Employment, Equity and Inclusion

March 22, 2022

Housekeeping I: Captioning

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Housekeeping II: Questions

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Welcome

Taryn Williams
Assistant Secretary,
Office of Disability Employment Policy (ODEP),
U.S. Department of Labor
Moderator

Lisa A. Mills, PhD
Moving To A Different Drum, LLC
Today’s Partner Teams

Colorado Partnerships to Support Competitive Employment

Sonoran Center for Excellence in Disabilities

North Carolina Combined Efforts to Support the Success of Those with Severe & Persistent Mental Illness

LEADCenter
<table>
<thead>
<tr>
<th>Learning Objectives</th>
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<tbody>
<tr>
<td><strong>Learn</strong></td>
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<tr>
<td><strong>Understand</strong></td>
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<td><strong>Learn about</strong></td>
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<td><strong>Recognize</strong></td>
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Definition of Sequencing

- **Sequencing** occurs when multiple funding streams separately and *sequentially* purchase and provide specific services that support an individual with a disability in pursuing, obtaining, or maintaining competitive integrated employment (CIE).

- Requires interagency coordination and collaboration to ensure no gaps in necessary services for individuals with disabilities pursuing and working in CIE.
Sequencing Lays Foundation for Stronger Methods

- **Sequencing** has proven to be *an important, formative practice* for funding sources seeking to coordinate resources and share responsibility/credit for individuals with disabilities achieving CIE.

- Experience indicates there are **better methods beyond sequencing**:
  - Offer better opportunities for collaborating funding sources to provide *more effective services*, ensure *continuity* in service delivery, and *increase successful outcomes*.
  - Provide *more holistic* supports of *sufficient intensity* for individuals with the most significant disabilities to succeed in CIE.

- People with disabilities can *advance toward and achieve CIE more quickly* if they can receive needed services simultaneously.
Definition of Braiding

- **Braiding** occurs when multiple funding streams, separately and *simultaneously*, purchase and provide specific services that support an individual with a disability in pursuing, obtaining or maintaining CIE.

- Requires interagency coordination and collaboration with goal to deliver more effective - and when necessary, more robust - supports for individuals with disabilities pursuing and working in CIE.
Braiding Requires Enhanced Collaboration and Generates Better Outcomes at Less Cost for Each Funder

• Braiding requires teamwork and communication –
  • Not just at hand-offs, which is typically the case with sequencing.
  • Coordination of services must ensure non-duplication.
  • Each funder’s plan for services must reflect the other funders’ services to create a holistic plan for the common customer to achieve desired outcome(s).

• Braiding brings higher likelihood of successful outcomes at lower cost
  • Emphasis on cost-sharing rather than cost-shifting.
  • Focus on division of payment responsibility - defining what each funder can provide in the short and long-term.
  • When multiple funders can pay for the same thing, clear agreement on who will pay when.
**Definition of Blending**

- **Blending** occurs when *dollars from multiple funding streams* are combined to *create a single “pot” of dollars* that is used to purchase services enabling an individual with a disability to pursue, obtain, and maintain CIE.

  - The simplest, most seamless way to cost-share around a common customer.

  - Results in mixing funds from multiple sources in way that funding from each program loses its program-specific identity.

  - Typically requires explicit authorization by statute or regulation to allow the blending of funds.

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Think: Baking a Cake

Common Customer Has
Single Plan and Budget
Blending Examples at System Level

- Blending examples that are approved –

  - *State general fund dollars* in one state agency’s budget is transferred to a second agency’s budget *using inter-agency transfer* to maximize federal match and increase the second agency’s capacity to provide their services to the first agency’s population.

  - Ticket to Work outcome and milestone *net* payments earned by an agency are combined with the agency’s typical funding sources to ‘pool’ available resources for purchase or provision of enhanced services to individual served.
Colorado Partnerships to Support Competitive Employment

Meghan Greene, MSW
CO Division of Vocational Rehabilitation (DVR)

Katie Taliercio
CO Department of Health Care Policy & Financing (HCPF)

Patricia Henke
CO Office of Employment First (COEF) – housed at Colorado’s UCEDD
Partnership is not a posture but a process - a continuous process that grows stronger each year as we devote ourselves to common tasks - JFK
Leveraged Resources

- Updated eligibility processes
- Cross agency collaboration to determine who is first payer and when
- Simplified referrals
- Quick access to services
- Training for all stakeholders
- School to work
Leveraged Resources, Program Success

- Disability Benefits 101
- Medicaid Buy-In
- Evidenced-Based Practice Service Expansion
- Sequencing of Services with Education
- Disability Program Navigators with Local Workforce Centers
- Medicaid Incentive-Based Payment Pilot
- Technology
- Elevating Employment First Community & Movement
Partnership and Formal Agreements in Action

DVR & HCPF Agree to:

- Designate a Supported Employment Lead who will coordinate between HCPF and DVR – administration.
- Develop and update statewide best practice to maximize seamless braided service delivery to individuals in services.
- Provide training and guidance (jointly).
Collaboration & Braiding of Funding (1)

I want a job!

Referral made to DVR

DVR has opened case with Job Seeker and begins Job Development

Medicaid Provider starts Discovery with Job Seeker while DVR works on application and eligibility

DVR Initial Job Coaching/Systematic Instruction

= Job Seeker  = Medicaid  = DVR
Collaboration & Braiding of Funding (2)

I need personal assistance in employment

Job Seeker reaches Stability with DVR

Medicaid funds may be used for hours DVR won’t fund

Job Seeker begins extended Job Coaching/Systematic Instruction services with Medicaid Provider

= Job Seeker  = Medicaid  = DVR
CO - Lessons Learned

- Meet the person where they are in their employment journey.
- Empower state agency staff (DVR/Medicaid) to collaborate around "payer of last resort" to make things happen at the local level.
- Understand that administrator level staff want to roll up their sleeves and help problem solve and support with technical assistance.
- Start earlier with instilling expectations of CIE.
Job Seeker Success- Meet Jess!
Think beyond braiding dollars and paid services!

- Family involvement is important.
- Jess’ family loves Cosmo’s Pizza, a Colorado favorite!
- Many visits to the restaurant meant Jess and his family got to know all the Cosmo’s Pizza employees.
- Jess’ family supported job coach and employer with negotiating position during pandemic.
Resource Documents

- EFAP MOU
- EFAP Strategic plan
- EFAP Summary Page
- EFAP Bylaws
- HCPF-DVR MOU
- Supported Employment Services Flowchart
North Carolina Combined Efforts to Support the Success of Those with Severe & Persistent Mental Illness

Kathie Trotter
North Carolina Vocational Rehabilitation Services

Alice Farrar
North Carolina Vocational Rehabilitation Services

Sam Hedrick
North Carolina Department of Health and Human Services
NC Combined Efforts to Support the Success of those with Severe (SMI) & Persistent Mental Illness (SPMI) (1)

The Individual Placement and Support (IPS) Supported Employment Program helps people with severe mental illness (SMI) find competitive, community employment and provides ongoing, individualized services with a focus on employment.

Services include:

• Personalized counseling to understand how work may affect your benefits.

• Ongoing treatment to help you manage medications, symptoms and other behavioral health needs.

• Employment specialist and peer support to help you succeed on the job and advance professionally.

If you have a mental illness that prevents you from working, talk to a VR counselor about how IPS Supported Employment to help you find and keep the job of your choice.
A Framework for Change

• Community-based supported housing
• Community-based mental health services
• Supported employment
• Discharge and transition planning
• Pre-admission screening and diversion
• Quality assurance

Sounds like things we already do, right?
Leveraging Resources in Support of Change
NC Core Funding Flow

Milestone 1: Engagement*
$493

Milestone 2: Career Profile
$985

Milestone 3: DVR Job Development with Retention**
$3,791

Milestone 4: DVR Job Support and Vocational Recovery**
$1,895

Milestone 5: DVR 90 days Successful Employment
$2,369

Blue – State/Medicaid
Orange – DVRS
Leveraging Resources in Support of Change
NC Core Funding Flow (continued)

Milestone 6:
210 Days Employment
$2,000

Milestones 7a and 7b Vocational Advancement***
$1,477

Incentive Milestones Under Consideration

Milestone Incentives for referral sources

Blue – State/Medicaid
Orange – DVRS
### State’s Investment in Transition to Community Living Initiative (TCL)/Housing Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of subcategories</th>
<th>FY 22/23 budget (change since FY 21/22)</th>
</tr>
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<tbody>
<tr>
<td>Housing</td>
<td>5</td>
<td>$40,067,684 (+24.2%)</td>
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<tr>
<td>Mental Health Supports</td>
<td>2</td>
<td>$5,091,161 (0%)</td>
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<tr>
<td>IPS/Employment</td>
<td>2</td>
<td>$3,973,141 (0%)</td>
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<tr>
<td>Quality Metrics</td>
<td>2</td>
<td>$2,093,824 (+94.6%)</td>
</tr>
<tr>
<td>Transition Coordinators</td>
<td>1</td>
<td>$810,000 (0%)</td>
</tr>
<tr>
<td>In-Reach</td>
<td>2</td>
<td>$3,250,783 (+0.6%)</td>
</tr>
<tr>
<td>Community Integration</td>
<td>1</td>
<td>$572,110 (+85.7%)</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>15</strong></td>
<td><strong>$55,858,703 (+19.5%)</strong></td>
</tr>
</tbody>
</table>
Collaboration is Key! (1)

NC DHHS Settlement Agreement with the Department of Justice

The State of North Carolina entered into a settlement agreement with the United States Department of Justice in 2012. The purpose of this agreement was to make sure that persons with mental illness are able to live in their communities in the least restrictive settings of their choice. The NC Department of Health and Human Services implements the agreement through the TCL Initiative.

https://www.ncdhhs.gov/about/department-initiatives/transitions-community-living-initiative/settlement-agreement-department
Collaboration is Key! (2)

Data Use Agreement & Memorandum of Agreement

By and Between:

• North Carolina Department of Health and Human Services, Division of Vocational Rehabilitation Services
• North Carolina Department of Health and Human Services, Division of Health Benefits
• North Carolina Department of Health and Human Services, Division of Mental Health, Developmental Disabilities, and Substance Abuse Services
NC - Lessons Learned

• All stakeholders need to have knowledge of each other’s goals and processes. We all share the goal of helping the client obtain competitive integrated employment!

• It is new for VR staff to see employment as a part of the treatment process rather than the end goal after all treatment is received. This concept and its success specifically for those with SPMI must be introduced to VR staff early on to avoid confusion and solidify buy-in.

• Keep the team motivated by celebrating the small wins along the way and do that celebrating together; as one large team!
John: A Story About Success
John is a 55-year-old male of African decent diagnosed with schizophrenia. He has faced many challenges throughout his adulthood: auditory and visual hallucinations, undiagnosed mental illness for years, difficulty getting the correct prescribed medications and then medication non-compliance, hospitalizations, homelessness, criminal charges, and long stretches of unemployment.

John understood that there are benefits to managing his schizophrenia with medication, but he felt that no one really listened to him until he met his psychiatrist at RHA Health Services. The psychiatrist discussed the Individual Placement and Support Program (IPS) with John and he was very excited about the idea of working.
During a joint intake meeting with John, his RHA and VR representatives asked questions and shared information, and John only had to share his story once. Employment Support Professional (ESP) Mickie and the VR Counselor worked together on helping John prepare for his job search including development of his resume, learning how to interview, understanding how to dress for an interview, among other very important preparation steps. John also linked with RHA’s Peer Support Specialist to explore housing. This resulted in him finding independent housing.
John & the IPS Partnership Team (1)

Once John completed his Associates Degree, he was ready to roll. His ESP took him into the community to complete job development and his VR Counselor and VR Business Relations Representative shared job leads and information. These leads resulted in interviews, but it took working with the entire team over 3-4 months to reach success. **John found success when the job opportunity came open at Open Door Ministries as a Monitor!**

As a Monitor, John works 2-3 nights per week, and this allows John to transition into the workforce and get a feel for work in human services. This opportunity has also allowed him to begin thinking about going back to school to pursue his long-term goal of becoming a Substance Use Counselor. This new job has helped John see himself as a contributor and one that is on the road to success.
John is very proud of his journey and thankful for the support and encouragement he receives from his IPS team: his provider, RHA, and his VR Counselor. Working together on John's goals, the system better provides resources and continuity to help him reach his immediate employment goals and his education goals to attain his future employment goals.
Sonoran Center for Excellence in Disabilities (Arizona)

Wendy Parent-Johnson  
Sonoran Center for Excellence in Developmental Disabilities

Kristen Mackey  
Arizona Rehabilitation Services Administration (RSA)

Nerissa Birdsell  
Baboquivari Unified School District (BUSD)
Getting the Partnership Started – University Centers for Excellence in Developmental Disabilities (UCEDD)

• Introduction to the Sonoran Center
• ACL Diversity Partnership Implementation Grant
  • Establish a disability resource office.
  • Promote a pipeline from high school to college.
• Learning about the community
  • Spending time together.
  • Building relationships.
• State level partnerships
  • Making connections.
Strategies for Building Local Partnerships: Braiding Resources in Practice

• Get to know each player, learn their perspective.
• Someone take the lead.
• Make the connections, bring people together.
• Have a local liaison/champion.
• Get started, even in a small way.
• Coordinate the moving parts, address gaps, keep it going.
Strategies for Building Local Partnerships: Braiding Resources in Practice (cont.)

- Provide the extra staff resources.
- Problem-solve challenges together.
- Ask “is this possible?” – Don’t assume the status quo.
- Look for new opportunities and resources to bring to the table.
- Achieve an outcome, share stories, inform partners for their accountability.
- Build provisions toward sustainability.
Making it Happen: State Vocational Rehabilitation

Pre-Employment Transition Services (Pre-ETS)
• Serve potentially eligible students beginning at the age 14 statewide.

Gap
• Limited staff and vendor capacity to serve all, especially Tribal and rural populations.

Partnerships
• Sonoran UCEDD Interagency Services Agreements
  • Employment First - existing agreement
  • Project SEARCH - existing agreement
  • Pre-ETS and Transition Services - new agreement
• MOU with Tribal VR - Tohono O’odham
Making it Happen: Baboquivari High School (1)

Journey
- Develop a Actionable Plans (Priority Areas)
- Sustain partnerships through ongoing planning and activities
- Use a framework for services (Priority Areas)
  - **Educational** (BUSD Transition Curriculum/Activities/Portfolio, Through UCEDD: Training/Workshops, Virtual presentations with speakers from various organizations, businesses & career fields, Transition Forum)
  - **Interagency Collaboration** (BUSD40, UCEDD, Tohono O’odham Community College (TOCC), RSA, VR, Division of Developmental Disabilities, Tribal VR, One Stop, & Special Needs Division)
Making it Happen: Baboquivari High School (2)

- **Student Involvement & Development** - (Workshops, Virtual Work-Based Learning, Transition Ahead Roundtable (TAR) Sessions, Work Adjustment Program through Tribal VR, Summer Work Program, “Finds Their Way” Project, Pre-Employment Transition Services, BUSD’s Project YES Club)

- **Family Involvement** (Transition Ahead Roundtable Forum (TAR Forum), Transition/Parent Night)
Clayton’s Success Story (1)
Clayton’s Success Story (2)

• High School
  • Bashas’ Store – Summer Youth Program
  • Dual Enrollment
  • Referrals – Transition Workshop, Group Intake
• Community Help (High School, Tribal VR, VR, TOCC, UCEDD)
• Graduate 2019, Attended Tohono O’odham Community College
• COVID-19 Impact
• Hired as Bus Aide for BUSD Transportation Dept. fulltime with benefits
• “Took time to talk and listen to me.” – Check ins. Help when needed.
Implementation Challenges: Braiding Resources to Promote Solutions

Challenges
• Lack of services
• Poor post-school outcomes
• Geography (distance, rural, transportation)
• COVID-19
• Technology access
• Staff shortages

Funding & Staff Resources
• State Vocational Rehabilitation – WIOA Core Partner
  • Section 110/Vocational Rehabilitation State/Federal funds - Administrative and General Service dollars
  • Pre-ETS Service dollars
• Baboquivari Unified School District dollars
• Tribal Vocational Rehabilitation dollars
• Sonoran Center UCEDD
  • ACL, Arizona Developmental Disabilities Planning Council, AZ VR, Kessler Foundation
Funding Pathways

School Referral

Coordinate referrals to partner agencies

- Work-Based Learning (State VR WIOA dollars, UCEDD staff time)
- Summer Work (State VR WIOA dollars, UCEDD staff time, Tribal VR staff support)
- Employment (Tribal VR dollars, State VR service dollars)
- Job and Follow up Support (Tribal VR staff time, High School staff time, UCEDD staff time)
- College (Tohono O’odham Community College Disability Support staff, High School staff time, UCEDD staff time)
AZ - Lessons Learned

• Take time to build relationships, “don’t have an ask.”
• Establish guiding long-term outcomes.
• Be flexible; open to change; emerging opportunities along the way.
• Utilize what you have to work with and build on available resources.
• Identify and acknowledge the challenges; find ways to overcome through partnerships for ideas and resources. Be creative.
• Think of existing funding as a solution and a driver to leverage additional resources.
• Recognize this is an organic process that grows and evolves over time.
Questions and Answers

Content questions?

Click on the Q&A button and type in your question.
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http://leadcenter.org/

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