

Individual Placement & Support (IPS) Supported Employment Fidelity Review Report West Central Behavioral Health

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BACKGROUND / AIM

Evidence-Based Practices (EBPs) like Individual Placement & Support (IPS) Supported Employment improve recovery outcomes for individuals with mental illness through the provision of quality services that are high in value and proven effective. To monitor and improve IPS services, Community Mental Health Centers (WCBHs) in NH participate in annual fidelity reviews for IPS. Dartmouth Health consultants follow the evidence-based practice (EBP) fidelity protocol and process for IPS fidelity reviews. Per the protocol, only services that are provided in-person count as face-to-face toward scoring because this is the service delivery method that has been thoroughly researched. As a result of the pandemic, some programs have shifted to providing virtual (tele video / phone) services in addition to in-person (face-to-face) interventions. Starting SFY 2023, Dartmouth consultants will include data/information about the amount of virtual (telehealth/telephone) services that are being provided; however, these types of services will not count toward scoring, per the fidelity model.

METHODOLOGY

Dartmouth Health consultants and WCBH worked together to complete a fidelity review during a 2-day on-site visit, following the protocol in the Supported Employment Fidelity Review Manual (Becker, et al.). Following the fidelity review, Dartmouth consultants provide the IPS team with a detailed fidelity report that provides observations, feedback, strengths, and recommendations, within 4 weeks of the fidelity review. Dartmouth consultants will continue to implement a strengths-based approach to identify strengths of programs, share successes, & facilitate WCBH peer to peer(s) consultation. The consultants are grateful for the professional courtesies and work invested by the WCBH staff in developing and providing these activities as part of the IPS fidelity review process. The various sources of information used for this fidelity review included:

- Reviewing IPS data & staffing reports and other documents regarding IPS services
- Interviews with the following WCBH staff: IPS team leader, WCBH executive team, and other members from WCBH treatment teams
- Consultants attempted to interview staff from Vocational Rehabilitation, but this was unsuccessful
- Meeting with individuals who receive IPS services, as well as family members
- Observation of 1 meeting, referred to as a "Service Line" meeting
- Observation of in-person employer meeting in the community by IPS specialist

REVIEW FINDINGS AND RECOMMENDATIONS

KEY

The following table includes: Fidelity items, observations, and recommendations.

ltem	Rating	STAFFING Section
# 1 Caseload Size	5	<u>OBSERVATIONS</u>
		Research has demonstrated that employment specialists with large caseloads have difficulty monitoring regular contact with individuals receiving IPS services and meeting other fidelity standards. Manageable caseloads allow IPS specialists time to provide effective employment services to people who are in different stages of working on goals for employment and school. The following components regarding caseloads for the WCBH IPS team are present:
		 Each IPS specialist on the IPS team has a discrete caseload of individuals he or she meets with regularly. The maximum caseload for any full-time equivalent IPS specialist is 20 or fewer individuals.
		The WCBH IPS program currently consists of 1 full-time WCBH staff, who serves as the IPS team leader, providing IPS services to 19 individuals.
#2	3	OBSERVATIONS
Employment Services Staff		IPS specialists who have dual roles (both vocational and clinical responsibilities) often get pulled into duties outside the IPS scope, leaving insufficient time to connect with employers or develop other skills needed for an effective IPS specialist. Regarding the WCBH IPS team:
		□ All IPS specialists provide employment services 96% or more of the time.
		The current IPS team leader spends about 80% of his time on employment services, while he spends about 8 hours per week providing case management / FSS services.
		RECOMMENDATION
		The IPS team at WCBH is currently comprised solely of the IPS team leader. There is 1 IPS staff vacancy. Given there is only 1 staff able to provide IPS services, it is recommended this staff dedicate all of his time providing IPS services. The team leader and leadership staff might want to work with the clinical teams on ensuring the focus of the IPS team's work is on employment related issues at least 96% of the time.

# 3	4	OBSERVATIONS
Vocational Generalists		Research has demonstrated that individuals receiving IPS services are more likely to stay engaged in services when working with 1 contact regarding all components of employment services. Employers also seem to prefer working with a single contact throughout the employment process. The WCBH IPS specialists carry out the full range of IPS activities with individuals, including:
		 ✓ Program intake ✓ Engagement ✓ Assessment / completing vocational profiles ❑ Job development / placement ✓ Job coaching ✓ Follow along supports for employed individuals receiving IPS services
		At the time of the review, the WCBH IPS staff was not routinely providing in-person job development activities.
		RECOMMENDATION
		As a comprehensive employment model, IPS is designed to provide the full range of employment services to all enrolled individuals. The team might consider contracting with VR for the IPS team to be a Community Rehabilitation Provider (CRP), which would then financially support the IPS specialist performing job development and job search for individuals receiving IPS services and working with VR. Additionally, please see Recommendation under the Job Development Frequency fidelity item regarding strategies to implement the beneficial service of in-person job development.
		ORGANIZATION Section
#1	3	OBSERVATIONS
Integration through Team Assignment		In order for IPS specialists to manage all of all of their duties providing IPS services, there should be a limit to the number of providers with whom each IPS specialist coordinates services with. WCBH IPS specialists are:
		Attached to no more than 2 mental health treatment teams, from which at least 90% of the IPS specialists' caseloads are compromised, on average.
		The current IPS team leader is providing IPS services for the entire agency, which consists of an ACT team and the remaining CSP clientele. There are 4 meetings that review clients, referred to at WCBH as "service lines," from which 2 of these meetings make-up 63% of his caseload. There is currently 1 IPS vacancy on the WCBH IPS team.

		The agency has transitioned from having integrated treatment team meetings to now arranging meetings via "service lines." The groups of professionals are now organized into independent services (therapy, case management, community support) and attend meetings based upon which prescriber is assigned to a client they are working with, as well as which location the client is served (Lebanon versus Claremont). The current IPS team leader is integrated into all 4 service line meetings, from which 2 of these meeting groups make-up 63% of his caseload. It is worth noting there ia 1 vacancy; therefore, the IPS team leader is meeting with more groups than he would if there were additional staffing.
		RECOMMENDATION
		It is difficult for IPS specialists to coordinate services with team providers and to be successful in other vocational duties when they are not organized into specific teams and work with a large number of providers. The agency might reconsider organizing professionals into distinct interdisciplinary mental health treatment teams. This would allow IPS specialists (and other specialty roles) to more effectively integrate with all mental health services. The IPS team leader does communicate information related to employment during the meeting, but much of the other discussion was focused on "engaged" or "not engaged," which would not allow the IPS specialist to hear clinical information from other providers that might help him (and the team) identify individuals that may benefit from IPS services.
		When the IPS vacancy at WCBH are filled, the IPS team leader should carefully evaluate meeting assignments and work toward having each IPS specialist work with no more than 2 meeting groups that make up 90% or more of their caseloads. The IPS team leader might want to work with their Human Resources and Marketing departments to produce creative advertising for the vacant IPS position.
# 2	5	OBSERVATIONS
Integration through Frequent		Frequent contacts between treatment team members help providers work together effectively to assist people with their employment goals. The WCBH IPS team supports this team integration philosophy in the following ways:
Contact		 IPS specialists attend weekly mental health treatment team meetings where individuals are reviewed routinely, not just individuals who are in crises. IPS specialists participate actively in treatment team meetings in treatment team meetings where team members engage in conversations about how to help individuals receiving IPS services achieve their employment goals. Employment services documentation (i.e., vocational assessment/profile, employment plan, progress notes) is fully integrated into individual's electronic mental health treatment record. IPS specialists' offices are in close proximity to (or shared with) their mental health treatment team members. IPS specialists help the team think about employment for people who haven't yet been referred to IPS services. The IPS specialists is currently working with 4 "service line" groups and attends each of these meetings weekly.

# 3	3	OBSERVATIONS
Collaboration between IPS & VR		State Vocational Rehabilitation (VR) counselors and IPS specialists each have knowledge and experience that is important to helping people with careers, and both should be involved in planning for good employment outcomes. The WCBH IPS team supports this collaboration in the following ways:
		 IPS specialists and Vocational Rehabilitation counselors have client-related contacts (phone, e-mail, in-person) at least monthly to discuss shared clients. The IPS team and VR counselors have scheduled face-to-face meetings at least monthly to discuss referrals.
		The IPS team leader reports having regular contact with the VR staff based on client need and involvement with VR.
		It is important to note that Consultants were unable to connect to the VR counselor at the scheduled appointment time. Several calls following the review were also made but were not successful and were not returned.
		RECOMMENDATION
		It is important to establish a way to have regular monthly in-person meetings to discuss potential referrals, as well as identify any challenges individuals receiving IPS services are facing and discuss possible solutions. These regular meetings will allow the 2 teams to discuss collaboration efforts, as well as shared individual challenges and successes.
# 4 Vocational Unit	1	OBSERVATIONS
Vocational Unit		A unit of people performing the same work is able to share ideas and information and provide back up for each other. The WCBH IPS team supports this team approach in the following ways:
		 The IPS team has at least 2 full time IPS specialists and a team leader that form an employment unit. The IPS team has weekly individual-based group supervision based on the IPS model in which strategies are identified. Job leads are shared. The IPS team provides coverage for each other's' caseloads when needed.
		At the time of the review, the WCBH IPS team consisted of 1 staff, the IPS team leader, with 1 IPS specialist vacancy. This low staffing level has been consistent for at least the past year.
		RECOMMENDATION
		Given the number of individuals being served at WCBH, there are likely a number of individuals who would benefit from IPS services that do not have access to the service. The agency should consider new and innovative efforts to fill the the IPS vacancy.

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Role of		OBSERVATIONS
Employment		
Supervisor		The WCBH IPS team leader carries out the following essential supervision functions:
		 The IPS team leader supervises a practicable number of employment specialists with their individual caseload devotion considered. The IPS team leader conducts weekly IPS supervision (group and/or individual). The IPS team leader works to assure integration with different treatment teams, attending each team on a quarterly basis. The IPS team leader takes an active role in training, and directly providing field mentoring for new IPS staff or staff that is having difficulty on a monthly basis. The IPS team leader regularly reviews the employment rate of individuals in the IPS program and establishes new goals for increasing that employment rate. The WCBH IPS team leader is currently the only IPS staff; therefore, there is no supervision, or IPS team group supervision, and there is no opportunity to provide field mentoring or to establish goals with the IPS team. While the agency measures the rate of employment across the agency, this rate is not shared on a regular basis. The employment rate within the IPS program is measured and has been shared across the agency at least once over the past year.
		RECOMMENDATION
		Once the vacancy on the WCBH IPS team are filled, the IPS team leader should set aside IPS supervisory time for field mentoring to ensure effective and well-integrated employment services. Field mentoring includes supervisors modeling skills while IPS specialists shadow, as well as supervisors coaching IPS specialists while they are practicing skills. Field mentoring would assist IPS specialists in learning new skills, as well as provide an opportunity for the IPS team leader to provide feedback to IPS specialists on current abilities and their job development strategies and skills. Field mentoring is recommended monthly for new IPS specialists or specialists having difficulty with job development, which might be evident by having few people working on a caseload, having limited job starts over the past quarter, or not completing targeted amount of weekly job development activities. Field mentoring should also occur on a quarterly basis for seasoned IPS staff to monitor their skills.
		Additionally, when the WCBH IPS team has filled the IPS specialist vacancy, the team leader should establish goals for increasing the employment rate. Identifying ways to increase this rate may motivate IPS specialists and also help individuals receiving IPS services get jobs more quickly.

#6	3	OBSERVATIONS
Zero Exclusion Criterion		An important foundation of IPS is that any person who wants to work should have access to IPS services. WCBH supports this philosophy in the following ways:
		 <u>All</u> individuals interested in working have access to IPS services. WCBH staff refer all individuals interested in work, regardless of symptoms and/or substance use. IPS specialists offer help with another job when one has ended, regardless of the reason that the job ended or number of jobs held. There is not a current wait list for individuals to begin IPS services. The IPS program has a mechanism for individuals to refer themselves to IPS services. Some staff report that the presence of symptoms and level of acuity, and/or use of substances, are factored into the decision about when to make referrals to IPS, and at times, they wait to make referrals until symptoms are well-managed. There is no information shared about the IPS program in waiting rooms, and there is currently a small waitlist for IPS services. The vacant IPS position
		undoubtedly contributes to the wait for IPS services.
		RECOMMENDATION
		It is difficult to provide IPS to all those who could benefit given the current staffing challenges. Additionally, the current IPS staff is also focusing on other services (case management / FSS services). The agency should focus on supporting the current IPS staff in dedicating all of his time to IPS, as well as focus on recruitment efforts for the open vacant IPS position.
		The agency should consider providing multiple training opportunities and messaging for front line staff, supervisors, individuals served by the agency, and all IPS staff regarding the fundamental principle of IPS services being available to all individuals regardless of work history, symptoms, substance use, recent hospitalizations or other staff fears, without using sheltered work, step-wise or work hardening employment strategies.
		The IPS team should develop and implement a consistent system that will allow individuals to directly refer themselves to IPS services. The program should take steps to ensure that individuals and family members understand the self-referral process to IPS services. One way is to create some visual postings in the waiting area with information on who to contact to self-refer.
#7	2	OBSERVATIONS
Agency Focus on Competitive Employment		Some people who have not worked, maybe for years, need encouragement to think about how a job would fit into their lives. Others need hope that they could be successful in a job that they would enjoy. WCBH promotes the importance of competitive work through multiple strategies, including:
		WCBH intake includes questions about interest in employment.

WCBH includes questions about interest in employment on all annual (or semi-annual) assessment or treatment plan reviews.
WCBH displays written postings (e.g., brochures, bulletin boards, posters) about working and IPS services, in lobby and
 other waiting areas. WCBH supports ways for individuals receiving IPS services to share work stories with other individuals and staff (e.g., WCBH-wide employment recognition events, in-service training, peer support groups, WCBH newsletter articles, invited speakers at treatment groups, etc.) at least twice a year.
WCBH measures rate of competitive employment on at least a quarterly basis and shares outcomes with WCBH leadership and staff.
At the time of the review, there were no written displays/postings about the IPS program, and there was no process in place that would allow individuals receiving IPS to share their work stories with other clients or staff.
RECOMMENDATION
Hearing from working peers helps many people feel hopeful about getting a job, and providers also benefit from hearing about how employment makes a difference in people's lives. The agency should consider additional methods that allow individuals receiving IPS services to share their employment success stories with agency staff and individuals that are not in the IPS program. Some examples include:
Having an IPS employee of the month recognition
 Having a panel of employed individuals receiving IPS services speaking to agency staff and individuals who are not yet working
 Story sharing on Facebook page/social media
 Newsletters shared with all individuals receiving agency services (provided by staff) Videos of work success stories
 "Meet and greet" with individuals that have participated in the IPS program
 Have individuals receiving IPS services attend team meetings or agency events to share their stories and the importance of work in their recovery
In addition to sharing stories with agency staff, it's imperative these success stories are also shared with people not yet in IPS services. Aside from helping staff understand the effectiveness of IPS and importance of work in recovery, the other intention of this element is to provide people not yet in IPS the opportunity to see the effectiveness of the program, giving them hope and confidence.
Every year, story sharing should be done with new stories, rather than repeating stories from the year prior. In addition to providing people not yet in IPS the opportunity to see how IPS can work, the other intention of this is to provide opportunities for different people in IPS to share their own successes.

#8	4	OBSERVATIONS
Executive Team Support for IPS		The WCBH executive team members' support in implementing, sustaining, and improving IPS services is imperative. The following components of WCBH's executive team support are present:
		 Executive Director and Clinical Director demonstrate knowledge regarding the principles of IPS. WCBH QA process includes an explicit review of the IPS program, or components of the program, at least every 6 months through the use of the IPS Fidelity Scale or until achieving high fidelity, and at least yearly thereafter. WCBH QA process uses the results of the fidelity assessment to improve IPS implementation and sustainability. At least one member of the executive team actively participates at IPS leadership team meetings (steering committee meetings) that occur at least every six months for high fidelity programs and at least quarterly for programs that have not yet achieved high fidelity. Steering committee is defined as a diverse group of stakeholders charged with reviewing fidelity, program implementation, and the service delivery system. Committee develops written action plans aimed at developing or sustaining high fidelity services. The WCBH CEO/Executive Director communicates how IPS services support the mission of the WCBH and articulates clear and specific goals for IPS and/or competitive employment to all WCBH staff during the first six months and at least annually (i.e., SE kickoff, all-WCBH meetings, WCBH newsletters, etc.). This item is not delegated to another administrator. IPS team leader shares information about EBP barriers and facilitators with the executive team (including the CEO) at least twice each year. The executive team helps the program leader identify and implement solutions to barriers.
		RECOMMENDATION
		Support from the Executive Director is critical to good program implementation and outcomes. Multiple staff members indicated they hear about the value of IPS services only from the IPS team leader at the agency. The CEO might consider communicating about the value of employment at all-staff meetings, in written communication, and via other opportunities on a regular and consistent basis.
		SERVICES Section
# 1 Work Incentive	3	OBSERVATIONS
Planning		In order to make decisions about work, comprehensive information about how work will affect each person's financial situation is critical. The WCBH IPS program supports this service in the following way:

		 All individuals receiving IPS services are offered and have access to comprehensive, individualized work incentives planning options throughout the employment process retirement benefits and any other source of income, throughout the employment process. Individuals receiving IPS services are provided information and assistance about reporting earnings to different benefit programs, if applicable. Individuals receiving IPS services are given information on where to access information about benefit planning. Currently, WCBH has a vacancy for a CWIC position. Some IPS clients have access to CWIC services via Vocational Rehabilitation; however, the majority of IPS clients do not have access or receive comprehensive work incentives counseling.
		RECOMMENDATION
		The agency provides some basic benefits counseling and instructs many individuals receiving IPS services to stay under SGA. While staying under the SGA is one strategy for working with benefits, it is not the only strategy and keeps a limit on how much individuals can earn and how independent individuals can become, and there are multiple work incentive programs available that could help individuals earn more while still having benefits. It is important for the agency to identify specially trained providers who can develop comprehensive work incentive counseling reports with options for individuals so they can make informed decisions about benefits and income. Such services may be found at Granite State Independent Living, as one example.
# 2	4	OBSERVATIONS
Disclosure		People should have choice about whether to share information, what information to share, and with whom. The WCBH IPS specialists help each person consider options and abide by individual choice in the following ways:
		IPS specialists do not require all individuals receiving IPS services to disclose their psychiatric disability at the work site in order to receive services.
		 IPS specialists offer to discuss the possible costs and benefits (pros and cons) of disclosure at the work site in advance of individuals disclosing at the work site. Employment specialists describe how disclosure relates to requesting accommodations and the IPS specialist's role communicating with the employer. IPS specialists discuss specific information to be disclosed and offer examples of what might be said to employers. IPS specialists discuss disclosure on more than one occasion The IPS team uses a comprehensive worksheet about disclosure with individuals receiving IPS services.
		The data from multiple sources of information for this item provided discrepant information. Almost all IPS notes indicated that disclosure was discussed in the session, written: <i>"Disclosure discussed? Yes."</i> No details of the individualized disclosure discussions were provided. Client interviews indicated that disclosure was discussed periodically but not with significant frequency. In the future, should the career profile and/or the progress notes not reflect specific, unique and individualized content about the disclosure discussions, a point will be deducted.

		RECOMMENDATION
		The IPS team should consider modifying the disclosure section on the career profile to provide the opportunity to specifically document the person's individualized and specific preferences around disclosure. This section should provide an opportunity for each person to identify their specific pros and cons for disclosing and not disclosing, specifically what they would like to be shared, and specifically what they would not like to be shared.
		Disclosure should be an ongoing discussion and brought up whenever there is opportunity to work with an employer. The way the disclosure conversations were documented in the records reviewed made it difficult to understand the individualized conversations, or unique preferences of the individual. When discussing disclosure, this should be specifically documented in the progress notes each time, displaying how the disclosure discussion came about, indicating possible pros and cons, specifically what the person does and does not want to share, and with which employer.
# 3	3	OBSERVATIONS
Ongoing, Work-based Vocational Assessment		The vocational assessment, or career profile, aids in gathering information leading to individualized employment and education planning, and it is updated with each new employment and education experience. The WCBH IPS team uses this document in the following effective ways:
		 The IPS team use a comprehensive career profile or vocational profile. Developing the vocational profile occurs over 2-3 sessions and information is documented on a vocational profile that includes preferences, experiences, skills, current adjustment, strengths, personal contacts, etc. The vocational profile is used to identify job types and work environments. The work history sections of the career or vocational profiles in individuals' records are complete. IPS specialists help individuals receiving IPS services learn from each job experience and also work with the treatment team to analyze job loss, job problems and job successes. The vocational profile is updated on a regular basis.
		 The vocational profile is updated on a regular basis. Career or vocational profiles include information from sources other than the person, such as family members, mental health practitioners, housing staff, etc.
		According to the records reviewed, 25% of the records had evidence of complete and updated vocational assessments. There were several career profiles that either had blank sections, the work history section was blank, or the profile was not updated with a job change.
		RECOMMENDATION
		The agency should establish a consistent process for vocational profiles to be regularly completed for all individuals receiving IPS services, and for those vocational profiles to be readily accessible in individual records. Vocational profiles should also be regularly updated. Updated vocational profiles incorporate new information learned about the person's strengths, talents, and potential

		 contributions to employers and conditions for the person success in a work environment from both the person's perspective, as well as the IPS specialist's perspective. This creates a continuous learning cycle for the person regarding employment. The team leader should provide training for IPS specialists regarding getting the vocational profile complete. It typically works best when IPS specialists use the following strategies when completing the vocational profile: Provide the individual rationale as to why collecting detailed information is important for helping them with their career. Collecting the information for the profile does not need to be the sole focus of the first meeting, and collecting this information can typically take two to four meetings. Showing the individual the vocational profile is typically not efficient; therefore, it's best to use a natural discussion style interview and fill in the profile, usually without the individual present. IPS specialists do not need to read all of the questions answered. IPS specialists use resumes as a tool to complete the vocational profile, asking questions from the resume to complete the profile. IPS specialists not only interview the individual, but gather information from the chart, treatment team members, other providers, past employers, and/or informal supports in order to have an individualized, individual-specific profile that will inform the job search.
# 4 Rapid Job Search for Competitive Employment	2	OBSERVATIONS It is important to ensure individuals receiving IPS services are assisted in contacting employers directly about competitive jobs, rather than participating in lengthy vocational counseling, prevocational groups or work adjustment programs. It is most effective when IPS specialists focus on the person's goal and begin the job search right away when people say they want to work. The WCBH IPS program addresses the rapid job search principle in the following ways:
		 The IPS program tracks first employer contacts consistently and properly. The first face-face contact with an employer by the individual or an IPS specialist about a competitive job is on average within 30 days after program entry.
		Many of the first employer contacts were not happening in-person, so cannot be factored into this calculation. It appears as there is opportunity for education on how to track the first employer contact, as the data indicated the first employer contact dates were miscalculated at times. RECOMMENDATION
		The IPS team leader should work to carefully and consistently document information about an individual's first contact with a potential employer or school and implement a reliable tracking system for these contacts. Reviewing this tracking system both in individual supervision, as well as group supervision, (once IPS specialists have been hired) can help increase efficiencies and

		keep the focus on such important tasks like first employer contacts. If rapid job search is not tracked in the future, the score will be reduced to a 1.
# 5	3	OBSERVATIONS
Individual Job Search		It is most beneficial when IPS specialists listen to what is most important to each person and learn about jobs that are individualized for each person by preferences, work experiences, interests, education, training, skills and talents. The WCBH IPS team uses the following strategies to consider good job matches for individuals receiving IPS services:
		 IPS specialists appear to make employer contacts based on job choices which reflect individual's preferences, strengths, symptoms, and lessons learned from previous jobs 90-100% of the time. Employer contacts are consistent with the current employment/job search plan. When individuals have limited work experience, IPS specialists provide information about a range of job options. IPS specialists use individualized written job (or education) search plans.
		According to the data reviewed, the IPS specialist makes employer contacts based on individual preferences about 50% of the time. It was difficult to determine if IPS specialists are helping individuals find work that matches with client goals and preferences. Most progress notes were check boxes with no detailed information about specifically what was discussed and/or what type of work was being sought.
		There was no evidence of individual employment plans, also known as job search plans. According to fidelity, "When there is no evidence of documented job search plans, reviewers do not score higher than a 3."
		RECOMMENDATION
		The IPS team leader should work to develop specific and personally meaningful employment goals with clients that include the nature of desired employment and other specific preferences. Individuals in IPS are much more likely to be motivated about employment when they have specific and individualized goals based on their unique preferences. Additionally, research has shown individuals are much more likely to be successful when they are working in a job they enjoy. The WCBH IPS team should provide information in the records that reflect individual and specific goals and preferences, and job search plans. Theoretically, one should be able to look at a section regarding employment goals and preferences on a profile or note, read it, and be able to identify which individual's chart it is in without looking at the name.
		Some individuals receiving IPS services may recurrently report they don't have specific job interests; in this case, IPS specialists should help individuals link their strengths and preferences to specific jobs and work settings, and determine specific reasons why their job preferences are interesting. Additionally, the IPS team leader may consider providing additional training and supervision around talking with individuals in creative ways to assist with individualizing a job goal. Here are some creative ways to help individuals identify job interests and goals:

		 Look at past resume and ask what job(s) AND duties were their favorite or least favorite, and why Set up informational interviews at various job types Use career surveys / interest assessments (Onet, Minnesota State career cluster survey, Career One Stop, 123test.com) Lists of pros and cons for different job types Visit different businesses in the community for them to explore Use a strengths survey to identify possible strong job fit Interview friends/families about their job history to learn about job types Look through job lists to learn about jobs and talk through what sounds interesting Ask who their role models are and why How does this connect to what they want for their future? Ask about what their week looks like; you might find out some useful information related to skills or interests Have a meeting with the individual and ISN(s) so they can help brainstorm IPS services would benefit from using a standard form for indicating each individual's employment goals that are specific, clear and has the date for each change. This might be done using a "Job Search Plan" or "Individual Employment Plan." Goals should always indicate what the individual also list objectives and steps to take during the job search, working toward the ultimate individualized goal and preferences. This form provides person-centered direction for IPS services. The following are options to add a Job Search Plan: The career profile document can be updated with a comprehensive section titled "Job Search Plan" or "Individual Employment Plan." The longer more comprehensive version of this Career Profile Update that has been shared could be used in conjunction as the Job Search Plan There can be an entirely separate Job Search Plan or Individual Employment Plan document
# 6 Job	1	OBSERVATIONS
Development Frequency		Creating employer relationships in the community that are specific to individuals' goals are related to better employment outcomes. The WCBH IPS team supports employer relationships in the following ways:
		 IPS specialists make approximately 6 face-face employer contacts that are client-specific per week. IPS specialists use a system for tracking employer contacts. The tracking system is reviewed by the IPS team leader on at least a weekly basis.
		According to the information provided, job development activities are being provided over the phone and rarely in-person.

	RECOMMENDATION IPS specialists should make 6 in-person employment contacts each week, which includes the team leader (prorated to caseload size). Contacts should be regularly documented in a job development log that is accessible to all IPS staff members. Frequent job development allows for IPS specialists to be knowledgeable about fluctuating requirements of different jobs and the range and needs of employers in their community. When the vacancy is filled, the IPS team leader might want to track each IPS specialist's job development contacts and provide supervision (including field mentoring) to IPS specialists who are not making at least 6 face-face employer contacts per week, on average. It is difficult to provide job development services given the current IPS team vacancy. Additionally, the current IPS staff is also focusing on other services (case management / FSS services). The agency should focus on supporting the current IPS staff in dedicating all of his time to IPS, as well as recruitment efforts for the open vacant IPS position.
# 7 Job Development Quality	OBSERVATIONS It is important IPS specialists learn about the needs and preferences of employers in order to introduce them to the right job candidates. Additionally, multiple in-person visits demonstrate that the IPS specialist is reliable and committed to long-term relationships with the employers. The WCBH IPS team uses the following strategies to support employer relationships: IPS specialist builds relationships with employers through multiple visits in-person that are planned to learn the needs of the employer. IPS specialists meet with employers in-person whether or not there is a job opening. IPS specialist advocates for individuals receiving IPS services by describing strengths that are a good match for employers and asks employers to interview individuals. IPS specialists consistently convey what the IPS program offers to the employer and the individual receiving IPS services. The IPS specialist does not ask about job openings during the early phases of the relationship (first or second appointments). Before leaving, specialists consistently identify a next step to the employer. As noted in "Job Development Frequency" section, job development is currently being conducted almost exclusively over the phone. According to fidelity, when IPS staff are not regularly meeting in-person with employers." An in-person employer meeting was observed during the fidelity visit. This visit was with a known employer and for a client that was working seasonally, with a "restart" date upcoming. This visit was a wonderful display of a great employer and IPS team relationship; however, the focus of this visit was for follow along support, rather than job development. </td

		RECOMMENDATION In order to develop employer relationships and engage in quality job development, IPS specialists should be making employer contacts on a regular basis (Please see Job Development Frequency Recommendation). IPS specialists should learn about the needs and preferences of employers in order to introduce them to the right job candidate. All IPS specialists should document employer contacts that capture the content and quality of these interactions and relationships. The IPS team leader should require use of an employer contact log for all IPS specialists to regularly to track, share, and improve employer contacts in the community. Job development logs provide readily accessible and current information about activities with all employer contacts and includes next steps for each employer. This log should be easily accessible to the whole IPS team (once hired). IPS specialists should present the strengths and abilities of the individual in mind during a job development contact, as this results in a greater likelihood of a positive job match for both the individual and the employer. Additionally, it is important for IPS specialists to provide information to employers about what the IPS program offers both the individuals receiving IPS services and the employers. Sharing the benefits of IPS with potential employers may provide the employer with the confidence to hire a candidate
		that is a positive job match, as well open up future communication between the employer and IPS specialist that might prevent potential challenges and encourage employee growth.
#8 Diversity of Joh	1	OBSERVATIONS
Diversity of Job Types		IPS specialists help individuals consider a wide range of positions that are specifically related to their goal(s) and preferences. IPS is an individualized service and specialists should avoid helping people with the same job types that do not meet their preferences. The WCBH IPS team supports individualized job goals, as evidenced by:
		☑ IPS specialists assist individuals receiving IPS services to obtain different job at least 85% of the time.
		According to the information reviewed, there were 4 job starts within the last 6 months. Per fidelity, if the number of examples in the past six months is fewer than five for a single IPS specialist, reviewers "score this item 1 because the sample size is too small."
		RECOMMENDATION
		It is difficult to provide comprehensive IPS services given the current IPS team vacancy. Additionally, the current IPS staff is also focusing on other services (case management / FSS services). The agency should focus on supporting the current IPS staff in dedicating all of his time to IPS, as well as recruitment efforts for the open vacant IPS position.

# 9 Diversity of Employers	1	<u>OBSERVATIONS</u> IPS specialists work with the full range of employers in their communities so that they can help individuals receiving IPS services find jobs related to their individualized needs and preferences. The WCBH IPS team works with a wide range of employers to individualize services, as evidenced by:
		IPS specialists assist individuals receiving IPS services to obtain jobs with different employers at least 85% of the time.
		According to the information reviewed, there were 4 job starts within the last 6 months. Per fidelity, if the number of examples in the past six months is fewer than five for a single specialist, reviewers "score this item 1 because the sample size is too small."
		RECOMMENDATION
		It is difficult to provide comprehensive IPS services given the current IPS team vacancy. Additionally, the current IPS staff is also focusing on other services (case management / FSS services). The agency should focus on supporting the current IPS staff in dedicating all of his time to IPS, as well as recruitment efforts for the open vacant IPS position.
# 10	5	OBSERVATIONS
Competitive Jobs		Regardless of disability, people can be successful in paid competitive careers; thus, it is unnecessary to for people to be placed in jobs that are set aside for those who have disabilities or in jobs that do not pay at least minimum wage. The WCBH IPS team supports competitive employment by:
		 Individuals receiving IPS services were not placed in jobs that were created for people with disabilities. Individuals receiving IPS services are placed in permanent positions, rather than temporary or time-limited positions. The IPS team does not place individuals receiving IPS services in volunteer positions, rather than paid employment. At least 95% of jobs held by individuals in IPS services are competitive jobs.
		According to the information reviewed, WCBH IPS clients are employed in competitive jobs at least 95% of the time.
# 11 Individual	3	<u>OBSERVATIONS</u>
Follow-along Supports		Helping people succeed at jobs and in educational/training programs is as important as helping them find employment. When someone is working or going to school, supports are individualized because different people have different needs and preferences related to working a job and going to school. The WCBH IPS team supports individualized follow along supports in the following ways:
		Individuals receiving IPS services receive different types of support for working a job that are based on the job, individual preferences, work history, needs, etc.

		 IPS specialists provide employer support at individuals' requests. IPS specialists help individuals receiving IPS services move onto more preferable jobs and also helps with school or certified training programs. The site provided examples of different types of support including enhanced supports by treatment team members, which are included in the written support plan. Written individualized job / educational plans are used and updated for working individuals receiving IPS services. While the WCBH IPS team provides follow along support to working IPS clients, there was no clear documentation of the supports provided in progress notes, and follow-along support plans are not being used. <u>RECOMMENDATION</u> The IPS team leader should work on developing and implementing a process for having written, individualized, follow along support plans for individuals receiving IPS services that begin work/school. Follow along support plans should be unique to the individual, their needs and preferences. The follow along plan should include an outline of supports that will be provided by the IPS specialist, as well as steps the individual will take in order to be successful. Follow along support plans should optimally include supports from other mental health center staff and informal supports.
# 12	3	OBSERVATIONS
Time- unlimited Follow-along Supports		There is some evidence that job loss is most likely to occur soon after a job start; therefore, providers are encouraged to offer more supports to people who have just become employed. After people work steadily and are satisfied with their job, the frequency of support is individualized based on the individual's needs and preferences. The WCBH IPS team provided the following supports to assist individuals receiving IPS services when working:
		 IPS specialists have face-to-face contact within 1 week before starting a job, on average. IPS specialists have face-to-face contact within 3 days after starting a job, on average. IPS specialists have face-to-face contact at least monthly for a year or more, on average, after working steadily and desired by individuals receiving IPS services. Individuals receiving IPS services are transitioned to step down job supports from mental health workers following steady employment. IPS specialists document job supports they provide.
		According to the data reviewed, the IPS specialist met the targets noted for the first 3 components noted above about 50% of the time. There was no clear documentation of the supports provided in progress notes, and follow-along support plans are not being used at WCBH.

		RECOMMENDATION
		The research indicates that job loss is most likely to occur soon after a job starts, so it's important that IPS specialists offer ample support to those newly employed. One way to ensure individuals receiving IPS services are supported when starting new jobs is to identify those individuals starting new jobs in weekly group supervision (once a team is hired), when a plan can be made to support the individual. The IPS team leader should develop follow along support strategies for the critical time period right around job starts, as well as document those specific strategies in the record in order to track what has worked well and when changes might be needed.
# 13	2	OBSERVATIONS
Community Services		Research has demonstrated that IPS specialists who carry out their job responsibilities away from their offices help more people with employment. The WCBH IPS team values providing services in the natural setting, as:
		□ IPS specialists spend 65% or more of their total scheduled work hours in the community.
		The multiple sources of data for this item reflected varied reports about time spent in the community. According to all sources of data averaged, the IPS specialist spends no more than 50% of the time in the community.
		RECOMMENDATION
		The IPS team leader should work on exploring how to provide IPS services more in the community setting. Providing services in the natural setting of the community, rather than from the office or virtually, is associated with increased employment rates for individuals receiving IPS services. Please also see Recommendation for Job Development Frequency item regarding providing in- person community-based job development services.
# 14	3	OBSERVATIONS
Assertive Engagement & Outreach		The reasons people stop attending IPS appointments vary, so it is important to learn about what is getting in the way of meeting by using various strategies and resources to do so. The WCBH IPS team uses the following strategies for outreach and engagement:
		 Service termination is not based on missed appointments or fixed time limits Systematic documentation of outreach attempts
		 Engagement and outreach attempts made by integrated team members Multiple home/community visits
		 Coordinated visits by IPS specialist with integrated team member Connect with family when applicable
		 Once it is clear the individual receiving IPS services no longer wants to work or continue with IPS services, the team stops outreach.

At the time of the review, there was only 1 IPS staff (the team leader) providing IPS services. When clients are not engaging in the service, they may be closed to allow someone else to access the service. Assertive outreach was not evident based on chart reviews. Given there is only 1 IPS staff, it may be difficult to provide all assertive engagement and outreach strategies. <u>RECOMMENDATION</u> The IPS team leader should work to develop and implement a plan on how to outreach in a variety of creative ways when individuals receiving IPS services are not engaging. It would be useful for the IPS team to also develop a list of outreach and engagement strategies that should be used by team members to engage individuals that are not engaging. The IPS team leader might also explore strategies around identifying and maintaining contact with individual supports, such as family. An individual's support system can be an integral tool in engagement, outreach, and supporting individuals' employment goals. It is difficult to provide multiple engagement and outreach methods given the current staffing vacancy on the WCBH IPS team. Additionally, the current IPS staff is also focusing on other services (case management / FSS services). The agency should focus on supporting the current IPS staff in dedicating all of his time to IPS, as well as recruitment efforts for the open vacant IPS position.

SUMMARY & CONCLUSIONS

Christine Powers, LICSW, MLADC and Katie McDonnell, MSW from Dartmouth Health conducted an IPS fidelity review with WCBH on May 17 and 18, 2023.

WCBH IPS services demonstrated strengths in the following areas:

- The WCBH IPS team leader focuses on finding IPS competitive employment for individuals involved in the program. It is evident that the IPS team leader understands the spirit and intent of IPS services, working with clients to explore paying meaningful careers, rather than temporary, volunteer, or sheltered work.
- The team leader is engaged and passionate about IPS. He has remained committed to the program and the importance of work in the treatment of mental health conditions, despite significant staffing challenges over the past year.

WCBH IPS services would benefit from focused quality improvement in the following areas:

- The IPS program would benefit from filling the current IPS vacancy. It is difficult for a one-person IPS team to meet the needs of all the individuals that could benefit from the program. When staffing levels improve, the IPS team leader will likely be able to make strides in the following areas:
 - o Vocational Generalist
 - Job development (frequency and quality)
 - o Integration through Team Assignment
 - o Role of Employment Supervisor
 - $\circ \quad \text{Zero Exclusion}$
 - o Agency Focus on Competitive Employment
 - o Vocational Unit
 - Diversity of Employers and Diversity of Job Types
 - Community-based Services
 - Engagement & Outreach
- The IPS team would benefit from additional training around providing and documenting individualized job searching, as well as assisting clients with identifying personally meaningful job goals based on clients' preferences and needs, rather than the job market. Clients are much more likely to be successful and hold a job if the position is a good fit and something they truly want to do.
- The IPS team leader would benefit from focused consultation that would help improve the tracking system being utilized to ensure tracking is being done accurately, efficiently, and in a way to set goals for improvement.

IPS Supported Employment Score Sheet		
Staffing	Rating 1 - 5	
1 Caseload Size	5	
2 Employment Services Staff	3	
3 Vocational Generalists	4	
Organization		
1 Integration of Rehab through team assignment	3	
2 Integration of Rehab through frequent contact	5	
3 Collaboration between SE & VR	3	
4 Vocational Unit	1	
5 Role of Employment Supervisor	3	
6 Zero Exclusion Criteria	3	
7 Agency Focus on Competitive Employment	2	
8 Executive Team Support for SE	4	
Services		
1 Work Incentive Planning	3	
2 Disclosure	4	
3 Ongoing, Work-based Vocational Assessment	3	
4 Rapid Job Search for Competitive Employment	2	
5 Individualized Job Search	3	
6 Job Development- Frequent Employer Contact	1	
7 Job Development- Quality of Employer Contact	1	
8 Diversity of Job Types	1	
9 Diversity of Employers	1	
10 Competitive Jobs	5	
11 Individualized Follow-along Supports	3	
12 Time-unlimited Follow-along Supports	3	
13 Community-based Services	2	
14 Engagement & Outreach by Integrated Team	3	
Total	71	

115 – 125 = Exemplary Fidelity
100 - 114 = Good Fidelity
74 – 99 = Fair Fidelity
73 and below = Not Supported Employment

WCBH IPS Fidelity Review Scoring SFY23

