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| Vendor name   | Goodwill of Orange County  |
| Vendor number(s)  | HM0388   |
| Primary regional center   | RCOC   |
| Service type(s)   | Work Activity Program  |
| Service code(s)   | 954  |
| Number of consumers currently serving   | 68   |
| Please describe your person-centered approach <sup>1</sup> in the concept development process; how did you involve the individuals for whom you provide services? | <p>Goodwill of Orange County (GIOC) has begun including all Work Activity Program (WAP) consumers in the transition planning to comply with Home and Community Based Services (HCBS) rules. This will be accomplished by facilitating updated Person Center Employment Planning for all consumers currently enrolled in the WAP program. GIOC has begun assisting all consumers with achieving their goals by providing several options which would include but are not limited to; obtaining Competitive Integrated Employment (CIE) at a 1:1 ratio within Goodwill of Orange County's CEO Program (Employment 1st) or obtaining CIE by enrolling in Goodwill's Supported Employment Program either in individualized or group employment, or by exiting the program to pursue interests outside of Goodwill. Individuals whose goals do not include CIE will have the option of enrolling in Goodwill's Community Based Program 1:4.</p> <p>In implementing this plan we have identified obstacles relating to individual's Social Security benefits. Therefore, we feel a focus on providing Social Security Benefits counseling to individuals within WAP is essential to this plan's success. We will offer outreach to individuals and their families about the social security programs. Resources will be made available to individuals and their families in verbiage and formats better understood by the population served. Lastly, we will offer one on one person centered guidance on their benefits as they enter CIE through programs that meet the definitions required by the HCBS settings rules.</p> <p>Including both information regarding an individual's benefits and their preferences with regard to managing them, will help us to work closely with an individual and their family to develop customized goals that best suit the needs of the individual. This will assist the individual in making the most informed choice about what programs and services meet their needs that will be compliant with the HCBS settings rules.</p> |

<sup>1</sup> A person-centered approach emphasizes what is important to the individual who receives services and focuses on personal preferences, satisfaction, and choice of supports in accessing the full benefits of community living. For more information regarding person-centered practices, please visit <http://www.nasdds.org/resource-library/person-centered-practices/>

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| <p>Does the concept address unmet service needs or service disparities? If so, how?</p>  | <p>Yes. Input received from persons served and their families participating in GIOCs WAP program demonstrates that concerns about overpayments, losing eligibility for Social Security Benefits, in addition to Medicare and Medicaid are a major contributor to the individuals and their families making a determination about seeking CIE. These concerns have caused hesitations in persons served to transfer towards community employment programs that meet the definitions required by the HCBS settings rules.</p> <p>Goodwill currently has a certified work incentives practitioner working within our Ticket to Work contract. Benefits counseling services have been offered to a limited number of persons served. The lack of resources available has severely limited the number of individuals that can receive the counseling. Additional funding resources would enable Goodwill to provide comprehensive benefits counseling to all individuals seeking employment opportunities.</p>  |
| <p>Barriers to compliance with the HCBS rules and/or project implementation</p>  | <p>Goodwill of Orange County understands that a small number of persons currently being served will select not to seek competitive employment. For these individuals, Goodwill will work closely with Regional Center staff to identify and assist in the transition process to programs / agencies outside of Goodwill that best meet their individual needs.</p>   |
| <p>Narrative/description of the project. Identify which HCBS federal requirements are currently out of compliance; include justification for funding request</p> | <p>The plan is to use three main strategies when providing information regarding Social Security Benefits to persons served and their families. The purpose of this is to help minimize the hesitation of pursuing competitive integrated employment.</p> <p><u>Group Workshops</u></p> <ul style="list-style-type: none"> <li>• No less than three group workshops will be provided to individuals enrolled in Goodwill's Work Activity Program. These will take place within the community at times and locations that best meet the schedules and needs of persons served and their families.</li> <li>• Information presented will cover both an overview of the SSI/SSDI programs in addition to work incentives, subsidies, and special conditions that can be commonly utilized to assist individuals working in a supported employment environment.</li> <li>• Information will be presented in the following languages; English, Spanish, Vietnamese, and ASL.</li> <li>• Information about social security benefits will be presented alongside information about supported employment programs.</li> </ul> <p><u>Workbooks</u></p> <ul style="list-style-type: none"> <li>• Goodwill will create workbooks that provide an overview of SSI and SSDI in formats and languages that is easily understood by persons served and their families.</li> </ul> |

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|   | <ul style="list-style-type: none"> <li>• Workbooks will include tools for individuals and their families to utilize, such as: wage reporting form letters, wage and benefit tracking sheets, and SSI calculation worksheets.</li> <li>• Workbooks will be utilized in both group and one on one workshop settings.</li> </ul> <p><u>Individualized Benefits Counseling</u></p> <ul style="list-style-type: none"> <li>• Goodwill will make one on one benefits counseling services available to any individual who is planning to move from WAP to CIE program options. This will be provided in a manner fully integrated with the supports and services received as part of both their current program and the HCBS compliant program that they choose to transfer into.</li> <li>• Benefits counseling will be provided by a certified work incentives practitioner</li> <li>• Benefits counseling will be individualized and include; an overview/ summary of a person’s individualized benefit information, assistance with utilizing work incentives, subsidies, and special conditions, a summary analysis of how specific job offers may impact an individual’s benefits, and monthly wage reporting assistance (as needed).</li> <li>• Benefits counseling will continue to be offered to individuals receiving SSDI up until the third month of their extended period of eligibility and will be offered to SSI recipients for up to nine months after employment is achieved.</li> </ul> |
| <p>Estimated budget; identify all major costs and benchmarks — attachments are acceptable</p> | <p>Please see attached budget detail and benchmarks for additional details.</p>   |
| <p>Requested funding for 2017-18</p>  | <p>Total cost of project is \$69,500</p>  |
| <p>Estimated timeline for the project</p>   | <p>All individuals will be transitioned out of the WAP program by 10/1/19. Individualized Benefits counseling will continue for individuals who have recently been transitioned to CIE for an additional three months. This will help to facilitate a smooth transition of services. Individualized Benefits counseling for the transitioning WAP individuals will end on 1/1/20.</p>   |

## Budget Detail and Benchmarks

### Term

- Budget Start Date: 6/1/18
- Budget End Date: 1/1/20

### Positions

One (1.0) FTE Certified work Incentives Practitioner. This person will be responsible for developing SSI/SSDI beneficiary workbooks, hosting/ coordinating group workshops, and providing individualized work incentives planning to individuals moving from the work activity program to competitive integrated employment.

- Hourly Wage (including burden) \$21.00
- Yearly Wage (including burden) \$44,000
- Total Cost for Work Incentives Practitioner \$66,000

### Marketing Materials (workbooks)

Workbooks providing an overview of SSI/ SSDI in addition to tools and information regarding commonly utilized work incentives.

- Total cost of development and printing \$2,000

### Certification Coursework

Cost of Coursework needed for certification of Work Incentives Practitioner. Obtained from Cornell University, Institute on Employment and Disability.

- Total cost of coursework \$1,500

### Project Timeline

#### **1/1/18- GIOC WAP Transition Continues**

- 1 current census of WAP Reduced to 68 individuals
- Development of Workbooks begins.

#### **6/1/18- GIOC Funded WAP Transition with SSA enhancements begins**

- Current census of WAP will be reduced to 61 individuals
- Workbooks completed and distributed
- 1 of 3 group workshops will be completed.
- Individualized Benefits counseling provided to 10 WAP participants

**1/1/19**

- Current census of WAP will be reduced to 38 individuals
- A minimum of 3 group workshops will be completed
- Individualized benefits counseling provided to 25 WAP participants

**6/1/19**

- Current census of WAP will be reduced to 19 individuals
- Individualized benefits counseling provided to 50 WAP participants

**10/1/19**

- Conclusion of WAP services at GIOC

Individualized Benefits counseling continues for additional three months for individuals who have transitioned to CIE.