

**Arizona Employment and Disability Partnership
Arizona's Medicaid Infrastructure Grant
2010 Continuation Proposal – August 2009
Application Narrative**

Introduction

The Arizona Health Care Cost Containment System (AHCCCS) is submitting a continuation proposal to the Center for Medicare and Medicaid Services (CMS) for the fourth year of a Medicaid Infrastructure Grant (MIG) entitled “Arizona Employment and Disability Partnership.” AHCCCS requests continued funding in the amount of \$996,920.88 including requested carryover funding in the amount of \$246,920.88 under grant number 1QACMS300122-03. The projected carryover amount is based on an estimate of 2009 grant period expenditures at the time of the proposal. The grantee intends to carryover all unexpended funds into the 2010 grant period.

The Arizona Employment and Disability Partnership (hereafter referred to as the “MIG” representing a composite unit comprised of the Advisory Committee members) recognizes, in an effort to reduce barriers to economic self-sufficiency for Arizonans with disabilities, it must create a sustainable leadership engine to further systemic change initiatives that continue beyond the duration of the MIG funding.

In addition to a focus on creating a sustainable leadership structure for adopting the charge and role after the duration of funding, the MIG seeks to utilize grant funding to create sustainable initiatives and activities. For instance, the MIG builds sustainability plans into initiatives/strategies with the goal to ultimately have them sustained by either a public or private partner (i.e. health care practitioner training initiative sustained through the Arizona Work Disability Prevention Association) and/or integrate innovations developed by the MIG into the existing services and supports to more effectively foster competitive employment supports for individuals with disabilities (i.e. develop effective business models for One-Stop Career Centers to directly serve individuals with disabilities and support them to implement and replicate the models in Arizona).

The aforementioned paragraphs provide a summary of themes that will be dually noted throughout the continuation proposal including identifying how the MIG plans to sustain the leadership structure after the duration of current funding; how has the MIG and how will the MIG continue to engage stakeholders throughout all facets of the MIG including leadership, planning, initiatives, etc.; what is being done to ensure that initiatives are sustainable and what and how are outcomes being measured to ascertain the effectiveness of the MIG on the employment and self-sufficiency outcomes of Arizonans with disabilities.

It is important to note the primary barrier that resulted in the delay of implementation of some MIG initiatives. The MIG intended to hire additional programmatic personnel, as indicated in the 2009 grant continuation application, to facilitate and monitor a number of project initiatives including the case manager training and provider training initiatives. As a result of Arizona's State Budget shortfall crisis, AHCCCS is not in a position to create another staff position. Conversely, the MIG Project Director's time was diverted to planning and implementing other training initiatives originally targeted for the responsibility of additional staff position which

rendered the Project Director unable to initiate other initiatives including the Medicaid Buy-In (MBI) program evaluation and member survey. That being said, the Project Director came up with an alternative plan to acquire “adjunct staff” to ensure the MIG has enough support to complete the project initiatives. The alternate plans were communicated to and approved by CMS through an email correspondence dated June 05, 2009.

Application Outline

The following bulleted list is an outline of the continuation proposal contents.

- ***2009 Workplan Outcomes and Strategy Progress Description***
A description of workplan outcomes and strategies expected to be accomplished during the 2009 grant period including a comparison of the progress made with the proposed project outcomes listed in the research plan.
- ***2010 Proposed Workplan Outcomes, Strategies and Timeline***
A description of proposed Workplan outcomes and strategies for the 2010 grant period including proposed outcomes and strategies presented in a revised research plan.
- ***Technical Assistance***
A description of the technical assistance support provided by the National Consortium for Health Systems Development (NCHSD).
- ***Logic Model***
A narrative logic model (accompanied by a logic chart) that identifies individual-level outcomes with system-level outcomes, outputs, activities and inputs.
- ***Key Contacts***
A list of the names, affiliation and title of individuals working on the grant that may be contacted by CMS.

2009 Workplan Outcomes and Strategy Progress Description

The 2009 grant activity progress and accomplishments are based on projections for the remainder of the year at the time of the continuation proposal and consistent with the first two quarterly reporting cycles. Therefore, if a strategy is identified as “accomplished,” it does not mean that it is accomplished at the time of the proposal but rather is expected to be accomplished prior to the end of the 2009 grant period.

The following list details the progress made on the 2009 workplan outcomes and strategies as outlined in the research plan (refer to Attachment A for a copy of the 2009 Research Plan). The research and evaluation strategies, including data collection information and updates on the workplan outcomes, will be noted in each core outcome area section subsequent to the progress summary. Additionally, another reason for the targeted research and evaluation summary for each workplan outcome is to allow an opportunity to provide updates on strategies that were not specifically identified in the 2009 workplan because they were carried forward from the 2008 grant budget period. It is important to note the strategies not only because they resulted in MIG expenditures for the 2009 grant budget period, but because they have research and evaluation implications relative to replication models and sustainable infrastructure for MIG initiatives.

2009 Grant Implementation Workplan Outcomes and Strategies

Core Outcome Area	Employment Training and Education	
Workplan Outcome	By December 31, 2009, 1,000 individuals will be trained to frame the message of employment in supporting individuals with disabilities to transition to work and self-sufficiency while informing them of options (i.e. work incentives, health care coverage, benefits planning, etc.) that they may access when making the transition.	Partially Accomplished
Strategy 1	By December 31, 2009, a team comprised of a physician specializing in occupational medicine and a Community Work Incentive Coordinator will conduct 50 training sessions to a general health care practitioner audience on their role in supporting patients to start, stay at or return to work	Partially Accomplished
Strategy 2	By December 31, 2009, Case Managers serving individuals with disabilities under the Arizona Long Term Care System, Elderly and Physically Disabled program will be mandated to receive initial and ongoing training in the areas of employment, education and housing (i.e. Public Benefits and Work Incentives 101) aimed at assisting them in identifying and supporting individuals served to obtain employment and make the transition to economic self-sufficiency	Partially Accomplished
Strategy 3	By December 31, 2009, six regionalized Public Benefits and Work Incentives 101 training sessions will be held for community-based rehabilitation providers/vendors within the RSA, DD and RBHA systems	Accomplished
Strategy 4	By June 31, 2009, MIG will convene and host a one-day meeting with asset building community; the work incentives planning and outreach community and the employment network community aimed at building sustainable relationships to increase the self sufficiency of people with disabilities. By December 31, 2009, a pilot project will be completed aimed at implementing cross-agency collaboration strategies between asset building programs, the Work Incentive Planning and Assistance program and Employment Networks.	Partially Accomplished
Strategy 5	By July 31, 2009, MIG will develop as a part of an existing national conference an employment workshop and conference session targeting the deaf/hard of hearing and deaf/blind community to inform them of the flexibility of social security disability benefits for employed individuals with disabilities, the Ticket to Work program, other social security work incentives and the benefits planning and assistance services offered by the Work Incentive Planning and Assistance program	Accomplished

Progress Summary: In the 2008 grant budget period (January-July 2008) the MIG conducted a pilot of the peer to peer health care practitioner training entitled, “A Place for Work in the Lives of Your Patients: New Resources and Techniques for Supporting Patients with Disabilities and Chronic Illness to Work.” An assessment of the pilot training was initiated in the 2008 grant budget period and progressed into the 2009 grant budget period. The assessment included a review and analyses of the on-site and post-training evaluations which leveraged consultative discussions with occupational physicians participating in the Arizona Work Disability Prevention Association (AWDPA). It was noted in an effort to build upon and enhance the impact of the training on the physician trainees and the patients they serve, the full scale implementation of the training should be conducted by an occupational physician(s) and incorporate more practical strategies and tools physicians can use to make employability decisions thereby enhancing the role they play in their patients transition to work.

In April 2009, a request for proposal was solicited and a contract award was made to Webility Corporation in May 2009. Dr. Jennifer Christian is the founder of Webility and the same person who led the team of practitioners that created the American College of Occupational and Environmental (ACOEM) Guidelines entitled, “Preventing Needless Work Disability by Helping People Stay Employed.” The ACOEM guidelines provided the foundational training concepts in the pilot project pertaining to the role of the practitioner in the return to work process, guidelines for making effective employability decisions and discussion points for systemic change options. Webility has initiated outreach plans including a tiered outreach approach to secure physician trainees and build relationships with organizations hosting regular and on-going continuing medical education rounds. The full scale implementation training, newly entitled “Practical Stuff They Didn’t Teach You in Medical School: Evidenced Based Clinical Decision Making That Helps Patients Start, Stay At and Return to Work,” will be completed in September 2009 and presented to the continuing medical education accrediting body for continued approval. It is estimated a total of twenty five training sessions will be conducted by the end of the current grant budget period.

Health and Disability Advocates (HDA) have been secured to support the development and facilitation of both the case manager and the employment provider training initiatives. The development of the respective training curriculums will be completed by September 2009. The case manager training curriculum will serve to promote case managers to share “employment first” messages, and provide an awareness of the transition to work and self-sufficiency options (including housing and education resources). Furthermore, the training will incorporate some practical tools mirroring those provided in the peer to peer practitioner training. For example, tools will be created and provided for the case managers to assist them in talking with the individuals they serve and supporting them to self-assess their employment options. Also to ensure the locally specific resource information is updated over time, the case managers will be provided tools to assist them in identifying and building relationships with employment, education and housing resources aimed at supporting the transition to self-sufficiency. HDA will complete the pilot by December 2009 with one managed care plan serving the Phoenix metropolitan area and two managed care plans serving rural areas of the state. Pertaining to the employment provider training initiative, HDA will conduct one training in each of the six designated regions throughout the state by December 2009. A draft schedule for the

implementation of the training sessions has been developed and the MIG staff is in the process of securing training venues. Sustainability plans and strategies for both the case manager and provider training initiatives will be deployed in the 2010 grant budget period and are identified in the section of the application entitled, “2010 Proposed Workplan Outcomes, Strategies and Timeline.”

The “Building Assets for Workers with Disabilities” workshop was held on August 11, 2009. A total of sixty-nine individuals representing either the benefits planning community for individuals with disabilities (Community Work Incentive Coordinators, Employment Networks, Disability Program Navigators) or the asset building community (Individual Development Accounts, Volunteer Income Tax Assistance, Earned Income Tax Credit, Financial Literacy and Family Self-Sufficiency). The purpose of this meeting was to expand the capacity of the existing asset building community through the development relationships between like-minded programs that both encourage and promote employment and self sustainability. The goal and intended outcome of the day long meeting was to identify specific opportunities for collaboration in the state aimed at expediting the self sustainability of program participants with disabilities. A number of concrete collaborative strategies were identified including the incorporation of a sub-committee of the Arizona Asset Building Coalition (formerly known as the Governor’s Earned Income Task Credit Taskforce) focused on employment and self-sufficiency programs. The MIG is in the process of reviewing the concrete strategies for the Coalition and identifying roles, responsibilities and timelines for completion. One concrete strategy pertaining to information and referral will serve as the cross-agency collaboration pilot project during the remainder of the 2009 grant budget period. A joint referral form will be developed to serve as tool to assist both the benefits planning community and the asset building community in identifying the resources individuals need to access during various points of the transition to work and self-sufficiency process.

The “Your Ticket to Work” Work Incentive Seminar Event (WISE) was held as a pre-conference session on July 28, 2009, to the National Black Deaf Advocates (NBDA) National Conference. In addition to the collaboration with the NBDA, the WISE was a collaborative effort between the Arizona Commission for the Deaf and Hard of Hearing (ACDHH) and all the Ticket to Work Partners (Social Security Administration, Work Incentive Planning and Assistance Program ‘WIPA’, Protection and Advocacy for Beneficiaries of Social Security, Employment Networks, Vocational Rehabilitation and Behavioral Health Services). The agenda for the WISE incorporated the traditional WIPA presentation along with a return to work testimony of a former beneficiary, Ticket to Work Partners panel presentation informing attendees of the roles and supports they provide in support of an individuals transition to work and self-sufficiency and an “open house” session featuring a table for each Ticket to Work Partner allowing the opportunity for beneficiaries to discuss their own personal situations with the agency that can best accommodate their present support needs. The WISE was attended by a total of twenty-five individuals, including eight beneficiaries and individuals representing community partners and Employment Networks. Subsequent to the WISE, the MIG hosted a “Ticket to Work” breakout session of the NBDA conference on July 29, 2009. The purpose of the session was to provide information, through a panel of the Arizona Ticket to Work Partners, on the Ticket to Work program and the partnering national programs instituted to provide support to individuals with disabilities desiring to make the transition to employment and economic self-sufficiency. The

session was attended by sixteen people including seven individuals with disabilities some of whom identified themselves as social security disability beneficiaries. As a result of the WISE, the ACDHH is interested in providing information to and supporting those agencies primarily providing employment based services to individuals who are deaf and hard of hearing to become Employment Networks.

Research and Evaluation Summary: A progress report (refer to Attachment B for a copy of the current report) of the associated workplan outcome entitled, “Employment Training and Education Report” will be updated on a quarterly basis and submitted with the quarterly reports. The report provides an incremental update on the number of individuals trained through the physician, case manager, provider and asset building training initiatives.

The peer to peer health care practitioner training initiative has a targeted research and evaluation component. A post-outcome training survey will be administered to the physician trainees approximately one to two months after the training session to determine the effectiveness of the training methods and materials; identify whether or not the trainees have utilized the practical strategies and tools to make employability decisions and identify potential incentives for soliciting physician trainees. A final analysis report will be developed aimed at supporting the replication of the training model.

Core Outcome Area	Outreach	
<i>Workplan Outcome</i>	By December 31, 2010, the number of new enrollees (first time participants) in the Freedom to Work (Medicaid Buy In) program will annually increase by 10% and the number of new enrollees in the Ticket to Work program will annually increase by 5%	Partially Accomplished
Strategy 1	On a quarterly basis, the MIG staff will work in collaboration with the AHCCCS Division of Member Services to monitor the reports generated by the Arizona Department of Economic Security and sent to ensure and evaluate that appropriate measures remain in place to screen applicants with disabilities that may be eligible for the Freedom to Work (MBI) program	Accomplished
Strategy 2	By May 31, 2009, MIG will convene and host a one day conference for One-Stops on utilizing the Ticket to Work program and potential models for building the capacity to directly serving individuals with disabilities at One Stops	Accomplished
Strategy 3	By December 31, 2009, a minimum of two One Stop Career Centers will develop and implement strategies to directly serve individuals with disabilities	Partially Accomplished
Strategy 4	By December 31, 2009, MIG will have convened a planning group of relevant state agency partners in developing a plan for building and sustaining on-line benefits planning and assistance tool for AZ	Not Accomplished

Progress Summary: The MIG continues to receive and monitor ongoing monthly reports from the AHCCCS, Division of Member Services (DMS) tracking the number of letters disseminated about the MBI program to individuals who were either denied or discontinued from acute Medicaid programs due to earned income. Additionally, information is provided and tracked on the number of phone calls received (along with the respective referral sources) by the MBI program. The purpose of the information is to continue to monitor and assess whether or not outreach methods through the Arizona Department of Economic Security (the agency responsible to perform eligibility operations for a majority of Medicaid health care insurance programs) and potential screening processes for the MBI program continue to be working. The “Medicaid Buy-In Outreach Tracking Report” is updated on a quarterly basis and accompanies the MIG quarterly reports (refer to Attachment C for a copy of the current report).

The “Make the Ticket Work for You,” Employment Network Training for One-Stop Career Centers (One-Stops) was held on May 07, 2009. A total of fourteen individuals representing ten of the seventeen local workforce investment areas attended the conference. Additionally, a total of seventeen individuals representing Ticket to Work Partners attended the conference in an attempt to offer their support to the Centers. The planning, facilitation and implementation of the workshop was a collaborative partnership between national programs including the NCHSD, CESSI, National Disability Institute and Maximus. The training agenda for the workshop was established with the goal in mind to provide information that would support the One-Stops in making an informed decision about whether or not to become an Employment Network. Additionally, another goal in mind that directed the agenda planning was to provide the information necessary to prepare for and respond to the MIG’s request for grant application proposal including information pertaining to how to apply to become an Employment Network, the Arizona “Partnership Plus” model, promising practices of One-Stop/Employment Network models, the services and supports provided by other Ticket to Work Partners and technical assistance available for prospective and active Employment Networks. The request for grant application proposals announcement was disseminated to individuals who attended the conference on June 22, 2009, and the responses were due on August 12, 2009. The proposals are currently under evaluation. The purpose of the grant applications was three-fold. One, build the capacity of Arizona to provide choice to serve social security disability beneficiaries making the transition to employment; two, encourage One-Stops to directly serve individuals with disabilities by integrating them into their general service provision system and programs and three, create replicable Employment Network models. As a result of the One-Stop training initiative, the Governor’s Council on Workforce Policy (State Workforce Investment Board) is interested in learning more about the Ticket to Work program and the Employment Network option to support more One-Stops in becoming Employment Networks. The MIG and CESSI will collaborate to present in front of the Board in October 2009.

The development of an online benefits planning tool has been delayed due to challenges resulting from the state budget crisis. The Arizona Rehabilitation Services Administration (RSA) had originally planned to use special project funding for the development of the tool. Subsequent to the original planning discussions, RSA was forced to enact an order of selection process and place newly referred individuals on a wait list for services. The special project funding was diverted to provide services to individuals who were granted eligibility prior to the enactment of the order of selection process. The MIG Project Director on August 14, 2009, confirmed with

RSA Administrators their commitment to utilized alternate funding (i.e. American Recovery and Re-Investment Act funds) for the development of the tool. Plans remain in place for the MIG to convene a planning group of relevant state partners to develop the plans for the online benefits planning tool. Information on the expanded role of the MIG for the 2010 grant budget period is provided in the application's section entitled, "2010 Proposed Workplan Outcomes, Strategies and Timeline."

On August 6, 2009, the MIG received approval from CMS to financially contribute and participate in the national employer engagement campaign. Funding was re-allocated from the personnel budget line item, savings noted due to the inability to hire another programmatic personnel. The campaign compliments the previous and current efforts to educate beneficiaries and those who play a role in the supportive employment process (health care practitioners, Employment Networks, employment service providers, case managers, etc.) about the new flexible supports and options available to individuals with disabilities desiring to make the transition to work and self-sufficiency. The national employer engagement campaign complements the aforementioned education efforts by incorporating an additional Arizona stakeholder, the employer. It is important to note the national employer engagement campaign is not noted as a strategy, but the information about the MIG's support of the campaign is included in the progress discussion for the "outreach" workplan. The MIG's financial support of the campaign will not extend beyond the 2009 grant budget period, but strategies to develop state infrastructure to support the local employers responding to the campaign will be initiated in the 2009 and completed in the 2010 grant budget period.

Research and Evaluation Summary: The progress report (refer to Attachment D for a copy of the current report) of the associated workplan outcome entitled, "Ticket to Work and Freedom to Work (Medicaid Buy-In) Enrollment Report" will be updated on an annual basis and submitted with the quarterly report subsequent to when the information is available from the noted source. The report will identify the increase in first time participants in the Ticket to Work and the MBI programs since the onset of the MIG (January 2007) through the conclusion of the MIG (December 2010).

The remaining activities for the Employment Network training and the beneficiary media campaign strategies from the 2008 grant budget period are not noted in the 2009 workplan. Progress noted on the activities is provided in this section because the activities have research and evaluation implications due to their intended outcomes of building replicable models and sustainable infrastructure for the MIG. The final installment of the National Employment Network's Association's (NENA), Employment Network development was originally planned to be the provision of individualized technical assistance to organizations that participated in the training sessions. After extending the available period of technical assistance through to the 2009 grant budget period, organizations did not take advantage of the support. Subsequent to the attempted provision of technical assistance, behavioral health providers solicited Employment Network development training from the MIG. The NENA contract was amended to include a provision for a training targeted for the aforementioned population. The training will be conducted prior to the conclusion of the 2009 grant budget period. Research and evaluation activities are planned for the remainder of the current grant budget period aimed at identifying the core training components and methods that support organizations to render a decision to

become Employment Networks and providing the information they need to start and grow their respective Employment Network programs. The information is intended to be shared for the purposes of developing replication models based upon lessons learned. Strategies for building sustainable infrastructure for the Employment Network development in Arizona are planned for the 2010 grant budget period and noted in the appropriate section of the grant application.

The MIG launched a beneficiary outreach media campaign beginning in February 2008 through August 2008. The campaign strategy was extended through the April 2009 to allow for the second attempt of the direct mail campaign disseminated to a targeted list of social security disability beneficiaries who meet researched based criteria of individuals most likely to return to work. The direct mail campaign was the result of a collaborative effort between the Social Security Administration, CESSI and the WIPA program. The media campaign analysis report is in the development process and expected to be completed prior to the conclusion of the 2009 grant budget period. The report will include a full analysis of the effectiveness of the campaign in reaching the intended audience and will serve as a tool for replication models.

Core Outcome Area	Research and Evaluation	
<i>Workplan Outcome</i>	By December 31, 2010, the number of SSDI beneficiaries who have had either benefits withheld or terminated due to employment and earnings will increase annually by 10%. By December 31, 2010, the number of SSI recipients in 1619(b) status will increase annually by 25% and the number of SSI recipients utilizing other work incentives (PASS, IRWE, BWE) will increase annually by 5%.	Partially Accomplished
Strategy 1	By June 30, 2009, an assessment of the current capacity of the work incentive planning and outreach infrastructure will be completed and reported	Accomplished
Strategy 2	By December 31, 2009, the Arizona Work Disability Prevention Association will develop a sustainable organization structure and complete a strategic planning process identifying initial priorities for the newly formed organization	Accomplished
Strategy 3	By December 31, 2009, an evaluation and member survey (including current and former enrolled members) of the Freedom to Work (Medicaid Buy-In) program will be conducted and reported. Outcome recommendations of the evaluation will pertain to building infrastructure and capacity to track employment outcomes.	Partially Accomplished
Strategy 4	By December 31, 2009, incorporate the Freedom to Work, Medicaid Buy In (MBI) application into the existing AHCCCS Health-e-Arizona online application system and upgrade the website accessibility	Partially Accomplished
Strategy 5	By December 31, 2009, the MIG will explore, develop and implement strategies that will institute and sustain the leadership structure and charge of the MIG beyond the duration of funding	Partially Accomplished

Progress Summary: The MIG is in the process, with the support of the contracted research and survey services vendor, of customizing the “Benefits Counselor” survey developed jointly by the MIG Research Assistance to States (RATS) and participating MIG states. The purpose of the survey is to assess the current capacity of the work incentive planning and outreach infrastructure in the state. Arizona is customizing the survey to make infrastructure changes in the tool that will enable more in depth analysis and answer Arizona specific research questions. During the customization process, the MIG Project Director has identified the targeted respondents for the survey to ensure the timely dissemination of the survey prior to the conclusion of the 2009 grant budget period. The findings of the strategy will be instrumental in planning the development of the online benefits planning tool.

The AWDPA has initiated the contract with the MIG by hiring two organizational development consultants to assist them in building a sustainable infrastructure including the development of a formal governance structure, fundraising toolkit, short and long term strategic plan and organizational capacity assessment aimed at providing recommendations for the administrative capacity necessary for varying stages of growth.

The MIG is in the process of securing Anne Reither of the MIG RATS to serve in the capacity of Project Manager for the MBI program evaluation and member survey. Ms. Reither, will assist in the development of research questions, provide technical assistance to and monitor the progress of the contracted firm’s deliverables and work in tandem with the MIG to develop a strategy plan for implementing the evaluation’s concluding recommendations. Once the contract is secured, the MIG will move forward in soliciting for a state contracted research and survey services vendor to perform the evaluation and conduct the member survey. It is anticipated that the activities undertaken for the remainder of the 2009 grant budget period will include soliciting and awarding a contract to a state contracted research and survey services firm.

The MIG is working in partnership with the AHCCCS, DMS division to incorporate the MBI screening process and online application into the Health-e-Arizona web portal. The existing firm contracted to build the back end infrastructure for the website has initiated the work to expand the capacity of the site to include the MBI screening process and online application and applied accessibility testing. The MIG will convene two, cross-disability focus groups to provide input on the accessibility of language and navigation options of the website. Input received will be compiled into recommendations to DMS and considered for language and structural changes to the website.

During the remainder of the 2009 grant period, the MIG will explore options for the sustainability of the MIG Advisory Council after the duration of funding including options for legal mandates (legislation or executive orders) and building relationships with potential hosting agencies that could provide administrative support. The sustainability plans will be developed and implemented in the 2010 grant budget period.

Research and Evaluation Summary: The progress report (refer to Attachment E for a copy of the current report) of the associated workplan outcome entitled, “Benefits Status and Work Incentive Utilization Report” will be updated on a annual basis and submitted with the quarterly report subsequent to when the information is available from the noted source. The

report will identify the increase in the number of Arizona Social Security Disability Insurance (SSDI) beneficiaries who have had benefits withheld or terminated as the result of work activity. Respectively, the report identifies the increase in work incentive utilization for Supplemental Security Income (SSI) recipients. The report outlines the progress of the workplan outcome since the onset of the MIG (January 2007) through the conclusion of the MIG (December 2010).

A report for the “Benefits Counselor” survey entitled, “Work Incentive Planning and Outreach Infrastructure Report” will be furnished (outlining and summarizing the findings) during the 2009 grant budget period and after the survey and analysis has been conducted.

The MIG originally planned and intended to complete the remaining phases of the strategic systems analysis exercise during the 2009 grant budget period in preparation for the 2010 grant continuation application. The preliminary phase of the strategic systems analysis was conducted in the 2008 grant budget period in preparation for the 2009 grant continuation application. The original plan was deferred because the MIG was granted the opportunity to participate in the RSA, Statewide Needs Assessment (SNAP). The information gathered during the MIGs preliminary phase was used as foundational material for the gathering of secondary data for the SNAP. In turn, the SNAP findings and the resulting RSA strategic plan serves as foundational material for the MIG to build upon in continuing the strategic systems analysis. Furthermore, the deployment of the “Benefits Counselor” survey will answer questions posed in the strategic systems analysis plans regarding the current capacity of the work incentive planning and outreach infrastructure. The exercise will continue through the 2010 grant budget period for the purposes of evaluating the employment systems environment (including an assessment of the MIGs impact on the respective systems) utilizing the SNAP framework to identify systems change strategies for a sustained MIG Advisory Committee and the relative community partners.

2010 Proposed Workplan Outcomes, Strategies and Timeline

This section presents a description of the 2010 grant budget period proposed workplan outcomes, strategies and timeline for completion (see Attachment F for a copy of the 2010 proposed research plan). The strategies outlined for the 2010 grant budget period are either final strategies to render an initiative complete or strategies that are planned to ensure the sustainability of an initiative beyond the duration of grant funding.

2010 Grant Implementation Workplan Outcomes and Strategies

Core Outcome Area	Employment Training and Education
<i>Workplan Outcome</i>	By December 31, 2010, 500 individuals will be trained to frame the message of employment in supporting individuals with disabilities to transition to work and self-sufficiency while informing them of options (i.e. work incentives, health care coverage, benefits planning, etc.) that they may access when making the transition
Strategy 1	By June 30, 2010, a team comprised of a physician specializing in occupational medicine and a Community Work Incentive Coordinator will conduct the remaining 25 training sessions to a general health care practitioner audience on their role in supporting patients to start, stay at or return to work

Strategy 2	By March 31, 2010, training for Case Managers serving individuals with disabilities under the Arizona Long Term Care System, Elderly and Physically Disabled program will be implemented by the health care plans to ensure case manager receive initial and ongoing training in the areas of employment, education and housing (i.e. Public Benefits and Work Incentives 101) aimed at assisting them in identifying and supporting individuals served to obtain employment and make the transition to economic self-sufficiency
Strategy 3	By June 30, 2010, strategies will be identified and implemented to sustain the provision of uniform training to community-based rehabilitation providers pertaining to the work incentives, public benefits and employment supports
Strategy 4	By July 31, 2010, a Memorandum of Understanding will be developed and implemented among and between the Arizona Rehabilitation Services Administration, Arizona Department of Economic Security (Division of Developmental Disabilities) and the Arizona Department of Health Services (Division of Behavioral Health Services) to adhere to a “work first” policy and ensure the sustainability of core employment training components for all service coordination personnel (case managers, support coordinators, employment specialists, etc.)

Summary: The remaining twenty-five training sessions of the peer to peer practitioner training initiative will be completed by the second quarter of the 2010 grant budget period. The AWDPA views the initiative as a pilot project for future AWDPA physician training initiatives consequently sustaining the MIG initiative beyond the duration of funding.

The MIG has developed a three prong strategy for building and sustaining knowledge of work incentives and work supports throughout the entire service system in Arizona so that all individuals with disabilities receive the same “employment first” message and information about support options they may access when making the transition to work and self-sufficiency.

During the first quarter of the 2010 grant budget period, HDA will conduct the train the trainer sessions with the case manager managers of the Arizona Long Term Care System (ALTCS) Medicaid Managed Care Plans. The case manager managers will be responsible for instituting the training into their existing training regiment. HDA will continue to provide technical assistance support, at a minimum on a monthly basis, to the designated training personnel to ensure their understanding of the material and training delivery methods. The MIG will work with AHCCCS to mandate the training requirement in the ALTCS Medicaid Managed Care Plan contracts.

The community based rehabilitation provider training will occur during the 2009 grant budget period, but in the 2010 grant budget period the sustainability strategies will be identified and implemented to make certain the providers are competent in their understanding of the options individuals may access to transition to work and self-sufficiency. The strategies developed will address how the providers will receive ongoing, uniform and updated training. Some potential sustainable strategies identified include requiring the providers, through their respective state contracts, to establish a fee for service relationship with the WIPA for the training while other options explore the possibility of offering incentives to the individual providers (i.e. continuing education credits) or agencies (enhanced rate to providers with established training competencies).

The final strategy in the three-pronged approach is to officially institute an “employment first” joint policy among and between the three primary agencies (RSA, Division of Developmental Disabilities and the Division of Behavioral Health Services) serving individuals with disabilities and providing employment based services. The agreement will take place in the form of a Memorandum of Understanding outlining the “employment first” joint policy and values. Furthermore, the partners will operationalize the collaborative by identifying core employment training components that will be infused into the existing training for all service coordination personnel (i.e. case managers, support coordinators and employment specialists, etc.).

Research and Evaluation: A progress report of the associated workplan outcome entitled, “Employment Training and Education Report” will be updated on a quarterly basis and submitted with the quarterly reports. The report provides an incremental update on the number of individuals trained through the physician, case manager and provider training initiatives.

Core Outcome Area	Outreach
<i>Workplan Outcome</i>	By December 31, 2010, the number of new enrollees (first time participants) in the Freedom to Work (Medicaid Buy In) program will annually increase by 10% and the number of new enrollees in the Ticket to Work program will annually increase by 5%
Strategy 1	On a quarterly basis, the MIG staff will work in collaboration with the AHCCCS Division of Member Services to monitor the reports generated by the Arizona Department of Economic Security and sent to ensure and evaluate that appropriate measures remain in place to screen applicants with disabilities that may be eligible for the Freedom to Work (MBI) program
Strategy 2	By March 31, 2010, an outreach plan, the development and deployment of outreach materials will be initiated to prospective applicants about the online application process of the MBI program through the Health-e-Arizona website portal
Strategy 3	By June 30, 2010, three employment and self-sufficiency resource fairs will be hosted by regional asset building coalitions for individuals with disabilities in their communities
Strategy 4	By June 30, 2010, Arizona will have an Employment Network association for and led by Employment Networks
Strategy 5	By December 31, 2010, one school district and one post-secondary educational institution will become Employment Networks
Strategy 6	By March 31, 2010, Arizona will have an employer engagement infrastructure that consists of a coordinated and collaborative approach aimed at responding to and supporting employers in their efforts to diversify their workforce and will build “fulfillment” strategies designed to streamline access for employers to qualified candidates
Strategy 7	By December 31, 2010, marketing materials complementary to the “Think Beyond the Label” national employer campaign will be developed and deployed for beneficiary outreach
Strategy 8	By December 31, 2010, Arizona will have an operating online work incentive planning tool and portal that incorporates a coordinated beneficiary outreach and response system

Strategy 9	By June 30, 2010, two One-Stop Career Centers will have implemented replicable Employment Network models
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Summary: The MIG will complete the initiative focused on ensuring potential applicants have information pertaining to the MBI program by continuing to monitor the outreach methods through Arizona Department of Economic Security and developing new outreach tools and dissemination strategies to inform potential applicants about the incorporation of the MBI screening process and online application through the Health-e-Arizona website portal. Some of the dissemination strategies will address how to disseminate the information through already existing mainstreamed avenues (i.e. Jobing.Com, Monster.Com, etc.) in an effort to reach those individuals who are not already connected to the “system.”

The regionally based employment and self-sufficiency fairs will be an opportunity for the regional asset building coalitions (inclusive of the benefits planning community serving individuals with disabilities to concretely demonstrate the sustainability of their cross-agency collaborative efforts. The fairs will be targeted for individuals already employed or seeking employment and on the road to self-sufficiency.

The Employment Network development initiative will include one final outreach strategy for one of the remaining employment support systems that has yet to be officially presented with the opportunity to become an Employment Network, school districts and post-secondary educational institutions. The MIG has already initiated discussions with CESSI on how to outreach to these institutions. For the remainder of the 2009 grant budget period, the MIG will help facilitate relationship building between this stakeholder group and CESSI. Part of the facilitation will include information gathering about what school districts and post-secondary educational institutions might be more interested to explore this financial option than others. Initial ideas include targeting discussion with the two designated University Centers for Excellence in Developmental Disabilities Education, Research and Service (UCEDD) in Arizona. During the 2010 grant budget period, the MIG and CESSI will devise and implement strategies to ensure the targeted group has the support they need to make an informed decision, information about promising practices and plans on how to implement an Employment Network program.

The MIG will finalize the support and sustainability of Employment Network development initiatives by concluding the support to the One-Stop pilot projects and share information with relevant partners (including those One-Stops that remain to become Employment Networks) about replicable models designed in Arizona. At the request of newly formed or re-activated Employment Network programs and in an effort to sustain the provision of information and technical assistance, the MIG will support Employment Network representatives to form a local Employment Network Association.

The MIG will initiate during the 2009 grant budget period and finalize in the 2010 grant budget period the formation of a state infrastructure to support local employers responding to the national employer campaign. The MIG will convene a meeting with relevant partners who have either implemented or designated employer engagement initiatives as a priority. The MIG learned of these initiatives and priorities during the strategic systems analysis exercise. The purpose of the meeting(s) will be to devise a coordinated employer response system that would

not only provide information to support employers in their workforce diversity efforts, but design a streamlined process for employers to access qualified candidates. As a complement to the national employer engagement campaign, the MIG will continue to develop outreach strategies and concrete marketing materials targeted to share the same message encouraging beneficiaries and job seekers with disabilities to “Think Beyond the Label.”

The online work incentives planning tool (formerly referred to as the “online benefits planning tool) will be developed and operational by the end of the 2010 grant budget period. The MIG will make more of a financial investment than what was originally planned coupled with supplemental financial support from RSA. RSA pledges to utilize American Recovery and Re-Investment Act funds and in-kind supports (i.e. designated staff time to support planning activities) to contribute to the development and operations of the tool. Additionally, RSA will provide ongoing support and funding for maintenance of the tool. The online work incentives planning tool will serve multiple purposes in building infrastructure and sustaining MIG initiatives. The tool will be utilized to build the capacity of the work incentives planning and outreach infrastructure and more specifically the WIPA program. An advanced back-end referral system will be built into the tool allowing service coordination personnel (case managers, vocational rehabilitation counselors, Employment Networks, etc.) to have some preliminary benefits planning discussions with beneficiaries and collect initial information (i.e. Benefits Planning Query) that will be securely transmitted to the WIPA program. The WIPA program resources are then freed up to engage in the benefits planning and management activities. The tool will also serve to build a beneficiary outreach and response system. Beneficiaries will have the option to elect whether or not they want an Employment Network to contact them and discuss options relative to the Ticket to Work program. Beneficiaries will complete a brief profile pertaining to their employment goals, employment and educational experiences and benefits status. Employment Networks will have access to the profile information transmitted by the beneficiary and the opportunity to respond to the inquiry. Finally the online work incentive planning tool, in addition to the primary goal to provide an option for beneficiaries to conduct scenario based planning for their transition to work, will assist the service coordination personnel in providing competent information to the individuals they serve about the impact of work on their state and federal benefits.

Research and Evaluation: The progress report of the associated workplan outcome entitled, “Ticket to Work and Freedom to Work (Medicaid Buy-In) Enrollment Report” will be updated on an annual basis and submitted with the quarterly report subsequent to when the information is available from the noted source. The report will identify the increase in first time participants in the Ticket to Work and the MBI programs since the onset of the MIG (January 2007) through the conclusion of the MIG (December 2010).

Core Outcome Area	Research and Evaluation
<i>Workplan Outcome</i>	By December 31, 2010, the number of SSDI beneficiaries who have had either benefits withheld or terminated due to employment and earnings will increase annually by 10%. By December 31, 2010, the number of SSI recipients in 1619(b) status will increase annually by 25% and the number of SSI recipients utilizing other work incentives (PASS, IRWE, BWE) will increase annually by 5%

Strategy 1	By December 31, 2010, an evaluation and member survey (including current and former enrolled members) of the Freedom to Work (Medicaid Buy-In) program will be conducted and reported. Outcome recommendations of the evaluation will pertain to building infrastructure and capacity to track employment outcomes.
Strategy 2	December 31, 2010, a strategic systems analysis will be conducted and reported including a multi-tiered assessment of the MIGs impact on Arizona's employment systems and job seekers/workers with disabilities. The report will include future recommendations for the sustained MIG Advisory Committee and other state and community partners.
Strategy 3	By December 31, 2010, the MIG will explore, develop and implement strategies that will institute and sustain the leadership planning infrastructure and charge of the MIG beyond the duration of funding

Summary: The MBI program evaluation and member survey will be initiated in the 2009 and conclude in the 2010 grant budget period. The evaluation and member survey will mirror studies previously undertaken by other state MIG partners. That being said, a specific outcome of the study is to assess the State's capacity to track employment outcomes. This would include identifying existing data elements, gaps in data collection and recommendations on how to build the infrastructure and implementation of the tracking methods. Furthermore, it is intended the capacity assessment process may identify additional data sources that can be accessed through data sharing agreements.

In the 2010 grant budget period, the MIG will utilize the analyzed results of the SNAP and "Benefits Counselor" survey as a framework and template for completing the strategic systems analysis. In collaboration with the relevant state partners, the exercise will result in building a unified vision for an employment supports continuum and consequently a plan for moving Arizona forward to create a comprehensive employment system.

It is intended to sustain the MIG Advisory Committee, after the duration of funding, by transitioning the Committee into an inter-agency coordinating and planning body pertaining to employment and disability. Strategies for sustainability include ensuring the body has administrative support to host meetings and make certain the body has outlets for making systems change recommendations to relevant governing agencies. During the 2010 grant budget period, the MIG will develop and implement concrete strategies for sustainability.

Research and Evaluation: The progress report of the associated workplan outcome entitled, "Benefits Status and Work Incentive Utilization Report" will be updated on an annual basis and submitted with the quarterly report subsequent to when the information is available from the noted source. The report will identify the increase in the number of Arizona Social Security Disability Insurance (SSDI) beneficiaries who have had benefits withheld or terminated as the result of work activity. Respectively, the report identifies the increase in work incentive utilization for Supplemental Security Income (SSI) recipients. The report outlines the progress of the workplan outcome since the onset of the MIG (January 2007) through the conclusion of the MIG (December 2010).

The MBI program evaluation and member survey and strategic systems analysis strategies will result in full reports that can be utilized for systems change planning purposes. The MBI evaluation report will include recommendations on next steps based upon information gathered and assessed including, but not limited to, recommendations pertaining to building infrastructure and capacity to track employment outcomes. The strategic systems analysis report will serve to provide recommendations for the sustained MIG Advisory Committee and other community partners to do in an effort to further expand or enhance infrastructure that supports individuals with disabilities to secure and sustain competitive employment.

Technical Assistance

The MIG intends to continue the State Leader Membership relationship with the National Consortium for Health Systems Development (NCHSD) in the 2010 grant period as was the case in the 2009 grant period (refer to Attachment G for a copy of the 2010 Technical Assistance Workplan). NCHSD staff personnel will provide technical assistance both internally to MIG staff and externally to MIG community partners. NCHSD staff personnel will provide technical assistance internally to MIG staff through the provision of consultation, information sharing, and product development, etc. For example, NCHSD will provide consultation on the planning and development of the online work incentives planning tool and portal. Conversely, NCHSD staff personnel will provide technical assistance externally to MIG community partners. For instance, NCHSD will provide technical support directly to the representatives of the One-Stop Career Center, Employment Network program pilot projects and the individuals responsible to implement the case manager training for the Medicaid managed care plans.

Logic Model

The logic model was developed in concert with the development of the 2010 research plan. The MIG Advisory Committee members were presented with a draft of the 2010 research plan. The MIG staff facilitated a review and input session of the research plan and interjected questions about the identification of resources, implementation strategies, products as a result of the implemented strategies and short and long term goals. The information was collected and utilized to create a logic model (refer to Attachment H for a copy of the Logic Model Chart).

The logic model chart should be reviewed beginning at the bottom portion of the chart through the top portion of the chart. The “inputs” box at the bottom outlines the resources that have been identified as necessary to implement the project and its respective activities. The Ticket to Work and Work Incentives Improvement ACT of 1999 provided the resources to create infrastructure for employment supports and services (i.e. Ticket to Work and Medicaid Buy-In programs). Additionally, the ACT allotted for MIG funding for states to implement systemic infrastructure and service system changes. The MIG funding coupled with the grant administrative agency, technical assistance and the Advisory Committee are resources that guided the planning and implementation of the MIG initiatives.

The “activities” outlined in the chart are the strategies outlined in the “2010 Grant Implementation Workplan Outcomes and Strategies” section the MIG is using to achieve short-term and long-term outcomes. The activities fall into three main categories of workplan core outcomes including “employment training and education,” “outreach” and “research and

evaluation.” It is important to note, the “employment training and education” and “outreach” workplan core outcomes influence the “systems change” outcome category.

The “outputs” are simply those products that will be developed or obtained as a result of the implementation of the strategies (i.e. training curriculums, collateral materials, survey/evaluation instruments, replication models, etc). It is the intention of the MIG to share the outputs of the project with other MIG state grantees through technical assistance activities.

The “short term” outcomes identify the outcome of the project initiatives while the “long term” outcomes” identify the outcome of the project initiatives on the individual-level outcomes of individuals with a disability. For example, the “short term” outcome is to create a work incentive planning tool that will support individuals with disabilities to make an informed decision about the transition to work. The “long term” outcome is to increase the number of individuals enrolled in the Ticket to Work and/or MBI programs.

Furthermore, one can note the progression of the long term outcomes from the left of the chart to the right. The first step is to increase the number of individuals with disabilities who receive work incentive planning and assistance services. Following, the next outcome is to increase the number of individuals with disabilities enrolled in the Ticket to Work and Freedom to Work (MBI) programs. Ultimately, the intention of all MIG activities and implementation strategies is to increase the number of individuals with disabilities able to leave the public cash benefit rolls because they are employed, earning self-supporting wages and accumulating wealth.

Key Contacts

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