Alaska Mental Health Trust Authority Beneficiary Employment Policy Review

Appendices

- Alaska Housing Finance Workgroup
- AMHTA Employment Focus Area Workgroup
- Anchorage Mental Health Court
- Anchorage School District
- Behavioral Health
- Veteran's Employment Training Service
- Governor's Council on Disability and Special Education
- Alaska Job Centers

Appendix A

List of Site Visits by ICI (Winter/Spring 2014)

February 27th – Anchorage

1. Meeting at the Council with I/DD Providers
    a. ARC of Anchorage, Hope Community Resources, Assets Inc.
    b. AKEELA (Large SA provider who also runs MHC in Ketchikan)

March 24th - Anchorage

2. YWCA
    a. Hilary Morgan (CEO)
3. Anchorage Community Mental Health Services
    a. Joan Cullinane (Employment Services)

March 25th - Anchorage

4. Senior & Disabilities Services
    a. Duane Mayes (Director)
5. Division of Behavioral Health
    a. Shanna McPheters (Supported Employment Programs Coordinator)
6. Hope Community Resources
    a. Peggy Robinson (Supported Employment Director)

March 26th - Anchorage

7. Alaska Family Services (Palmer)
    a. (not sure who you met with there)
8. Cook Inlet Tribal Council
    a. Leticia Freed (VR Counselor)
9. ARC of Anchorage
    a. Danny Parish (Supported Employment Programs Coordinator)
10. Trust Core Workgroup Meeting (many representatives)

March 27th – Juneau

11. REACH
    a. Millie Ryan (Executive Director)
12. Gastineau Human Services

      a.   Michael Pellerin (Executive Director)
      b.   Michelle Federico (Employment Programs Director)
13. JAHMI
      a.   Pam Watts (Director)
      b.   Margery Goodrich (Residential Services Director)
      c.   Douglas Harris (Clinical Director)
14. Polaris House
      a.   Bruce (Director)
15. Alaska Mental Health Board / Advisory Board on Alcoholism & Drug Abuse
      a.   Kate Burkhart (Executive Director)
      b.   Scott Ciambor (Program Coordinator)
16. Division of Vocational Rehabilitation
      a.   Cheryl Walsh (Director)
17. Employment Security Division
      a.   James Harvey (Director)
      b.   Nikki Powis (DEI State Lead Disability Resource Coordinator)

March 28th – Juneau

18. Division of Public Assistance
      a.   Ron Kreher (Director)
      b.   Erin Walker Tolles (Chief of Policy & Program Development)

May 12th – Anchorage

19. Alaska Mental Health Court
      a.   Judge Stephanie Rhodes
      b.   Kate Sumey (Project Manager)

May 13th – Fairbanks

20. Fairbanks Resource Agency
      a.   Carol Chalk (Employment Services Director)
      b.   Eric Holland (Chief Operating Officer)
21. Tanana Chiefs Conference
      a.   Amanda Race (VR Counselor)
22. Access Alaska
      a.   Ann Lefeavor (Youth Employment Program Director)

May 14th – Bethel

23. Association of Village Council Presidents (AVCP) Tribal VR
    a. Irma Goodwine (VR Counselor)
    b. Dana Kopanuk (VR Assistant)
24. Yukon Kuskokwim Health Corporation
    a. Richard Robb (Director of Residential Services)
25. Yuut Elitnaurviat (People's Learning Center)
    a. Kurt Kuhne (Executive Director)
26. Yukon Kuskokwim Correctional Center
    a. L. Dean Marshall (Superintendent)

May 15th – Anchorage

27. Dimond High School
    a. David Kohler (ASD Transition Coordinator)
28. Alaska Mental Health Consumer Web
    a. Susan Musante (Executive Director)
29. Assets, Inc.
    a. Matt Jones (Executive Director)
    b. Jonathan Fortney (Community Services Program Director)
30. Partners Reentry Center
    a. Cathleen McLaughlin (Program Director)
    b. Claire Waddoup (Executive Director of Partners for Progress)

Appendix B

Policy and Document Review

Title of Document	Brief Description of Document	Related Elements
A Study of Trust Beneficiaries in the Alaska Department of Corrections	This document contains the findings of and resulting recommendations from a study on the experiences of AMHTA Beneficiaries within the AK Dept of Corrections (ADOC). "Major findings from the study indicate that approximately 42 percent of all inmates in custody ADOC are Beneficiaries of the AMHTA. Among those identified, Trust Beneficiaries are more likely to recidivate, recidivate sooner, and spend more time in custody of the ADOC than other inmates". Six recommendations are made, including revisions and updates to methods of screening, assessing, and entering/sharing information about the Trust Beneficiary population before or at the point of entering into ADOC custody, and incorporating ways of improving continuity of care for this population when exiting ADOC custody, such as facilitating reinstatement of disability benefits, evidence-based services for the mentally ill, and community-based treatment and support services.	Relevant elements of the High Performing States Model might include **Interagency Collaboration** (i.e. utilizing liaisons between ADOC, local Social Security and State Medicaid offices, and other community-based treatment and support services) and **Services and Service Innovation** (i.e. recommendations calling for improved screening and assessment protocols prior to incarceration and continuity of care during and following incarceration).
Supported Employment Matrix	This document contains a chart that compares Pre-Employment, Supported/Customized Employment, and Stabilization and Long-Term Support in terms of services, outcomes, and funding. Other comments and a list of definitions of key terms are included as well.	

Title of Document	Brief Description of Document	Related Elements
Alaska Works Initiative: 2006-2010 Strategic Plan	As the title suggests, this document contains the AWI 2006-2010 strategic plan for forwarding the stated purpose that "Alaskans who experience disabilities are employed at a rate as close as possible to that of the general population." Identified goals fell into four focus areas: work as an expectation, outreach and training, resources and funding, and connectivity, coordination, and workforce investment.	Described strategic plan highlights all elements of the High Performing States Model at various points (especially **Strategic Goals and Operating Policies**). "Final Priorities from AWI 2010 Summit.doc" contains a follow up to this plan
SDS Responses to AADD 9/11/13	This document contains questions posed to the SDS following change in regulations. Topics include nursing services and waivers that may or may not cover nursing services, day habilitation services and transportation, family home habilitation sites, providers, and services, and supported employment (transportation/ career advancement services).	Questions 5 and 6 in this document pertain to "Supported Employment Conditions of Participation". Q5 is about transportation services, and the response indicates that transportation services are not automatically included in supported employment services (community-based transportation is encouraged), but under some circumstances it can be. Q6 is about career advancement activities. The response states that requests for career advancement activities should be accompanied by clear goals and objectives relevant to **Services and Service Innovation** and to some degree **Financing and Contracting Methods**.

Title of Document	Brief Description of Document	Related Elements
Client Status Review	Contains assessment form, used by the DHSS/Division of Behavioral Health. Last updated (?) and June 2010. Asks about: mental and physical health (including suicidal thoughts and self harm, substance use, and emergency medical services), employment and education status, housing situation, recent involvement with the legal system, life satisfaction, and feedback if the person "received services from this agency".	
Work As An Expectation: Supported Employment As An Evidence-Based Practice, A Guide For Employment Specialists	The intended audience of this workbook is employment specialists and its stated purpose is to provide principles and strategies needed for employment specialists to be effective. The workbook includes definitions of supported employment, core principles of supported employment, several chapters about nuts and bolts of supported employment(e.g. referrals, assessments, job finding, etc.), a chapter about how to engage other critical stakeholders (e.g. family members, employers, etc.), and a number of sample forms and checklists.	Regarding the HPSM: Employment specialists following the recommendation in this guide can be considered "champions" for employment, as per the **Leadership** element of the model. The work book would likely also be categorized as **Training and Technical Assistance**, as it provides recommendations directly to employment specialists. **Interagency Collaboration** could also be considered, particularly because of the inclusion of a chapter about engaging other stakeholders.

Title of Document	Brief Description of Document	Related Elements
Review of Home and Community Based Waiver and Personal Care Assistant Services Rendered During FY2013	Information about a series of waiver programs, such as total expenditures, number of participants, cost per participants, and cost of the program, is presented in chart and graph format. Programs included in the review include: children with complex medical conditions, intellectual and developmental disabilities, adults with physical and developmental disabilities, adults with physical disabilities, Alaskans living independently, older Alaskans, and personal care assistance.	Could categorize under **Financing and Contract Methods** and/or perhaps **employment performance measurement, quality assurance, and program oversight.**
Alaska Scorecard: Key Issues Impacting Alaska Mental Health Trust Beneficiaries	This document first presents a list of "key issues" in the categories of health, safety, living with dignity, and economic security, impacting AMHTA's beneficiaries. Statistics for each key issue include most current US data, the previous year's AK data, and the most current AK data, and symbols next to each key issue represent whether the issue needs improvement, is satisfactory, or uncertain. Following this list of key issues and statistics, a more detailed description of each issue is provided, including some additional charts and tables, notes, and data sources. The document was created in 2013.	This document is relevant in describing areas of need in AK. Areas that pertain to employment include the 3 items in the "economic security category" (percent of minimum wage income needed to afford average housing, average annual unemployment rate, and percent of SSI recipients who are blind or disabled and are working), and possibly the items in the subcategory of "educational goals" under the "living with dignity" category. Elements: **employment measurement, quality assurance, and program oversight**

Title of Document	Brief Description of Document	Related Elements
7 AAC 130.270. Supported employment services	Draft of supported employment services regulations, as developed by SDS, dated November 2012. The regulations described in this document cover what kind of supported employment services the department will pay for, what defines supported employment services, and what the department will not pay for.	Categorized under **Strategic Goals and Operating Policies** and/or **Financing and Contracting Methods.**
	This document contains 3 tables comparing hours worked and wages earned by youth with I/DD compared to youth that are non-I/DD in FY 2013 and FY 2014.	Relevant to transition
Alaska's Home and Community Based Medicaid Waivers	This document contains a couple sources of information, all describing home and community based waiver services in AK. The 4 Medicaid waivers described include Alaskans Living Independently Waiver, Adults with Physical and Developmental Disabilities Waiver, Children with Complex Medical Conditions Waiver, and Intellectual and Developmental Disabilities Waiver. In this document, there is also a screenshot of the AK SDS web page on the Nursing Facility Level of Care Waiver Unit.	Of the 4 Medicaid waivers, only the Alaskans Living Independently Waiver does not cover supported employment services (supported employment services are defined as "training, support, and supervision to get job skills and to help find and keep a job"). **Financing and Contracting Methods**
House Bill No. 211 "An Act relating to the education and employment of individuals with disabilities"	This document contains amendments to AK state law that represent an Employment First priority.	Elements include: **Leadership** and **Strategic Goals and Operating Policies.** Also relevant to transition.

Title of Document	Brief Description of Document	Related Elements
AMHTA Employment Focus Area Work Group Environmental Scan	This document, dated April 2014, contains one page of bulleted statements about the Alaska Housing Finance Corporation's rental assistance programs. AHFC is "in the process of implementing a Rent Reform program" which will apply to participating households with at least one adult (over 18) who is not elderly or experiencing a disability. One result of this Rent Reform program will be expanded employment referral bases, which households "comprised of elderly or disabled individuals" may still utilize. AHFC currently tracks data on employment, among other demographic variables.	**Interagency Collaboration** (between AMHTA and AHFC)**, and**/or **Employment Performance Measurement, Quality Assurance, and Program Oversight** (AHFC's data collection includes employment data)**.**
Includes several documents, the first of which is titled "Guidelines for the *Inventory for Client and Agency Planning* (ICAP) Process" and the others are related	This nearly-100-page document contains a few related documents, including: a State of Alaska SDS document of guidelines for the ICAP process, a DDA document providing information in Q&A format for ICAP respondents and a form titled "Declaration of Understanding" for respondents, several pages of PowerPoint slides titled "Inventory for Client and Agency Planning Instructor Training Program", and a 2006 report prepared for the Division of Dev. Disabilities, Colorado Dept of Human Services titled "Assessment Instruments and Community Services Rate Determination: Review and Analysis".	
AK Implementing Automated Disability Service Planning; Harmony Info Systems Wins $2.5 Million Contract	This document contains a copy of an article about a $2.5 million contract to design, develop, and implement a new DSDS (Div of Senior and Disabilities Services) Provider Portal and Automated Service Plan (PP and ASP) solution. The contract period is from Jan 2014 through Nov 2015.	**Interagency Collaboration, Employment Performance Measurement, Quality Assurance, and Program Oversight,** and perhaps to some degree **Services and Service Innovation** or **Financing and Contracting Methods.**

Title of Document	Brief Description of Document	Related Elements
Customized Employment Basic Training (presented by The Alaska Disability Employment Initiative, Sponsored by The Alaska Governor's Council on Disabilities and Special Education and The University of Alaska Center for Human Development)	This document, dated November 2013, contains a drafted agenda for a 3 day training about customized employment.	**Training and Technical Assistance**.
n/a	Hyperlinks and relevant web pages of the following agencies: Division of Vocational Rehabilitation, Division of Behavioral Health, Division of Senior and Disabilities Services, and Division of Public Assistance.	
n/a	link for DBH http://manuals.medicaidalaska.com/cbhs/cbhs.htm; http://manuals.medicaidalaska.com/	
Comprehensive Community Support Services for Adults (CCSS), Peer Support Services (PSS), Case Management (CM)	This document contains 3 charts, one of each of the services named in the "Title" column. The charts describe definitions, requirements, expectations, target population, staff qualifications, location, payment rate, etc. for each of the services.	
8 AAC 15.120. Minimum wage exemption for handicapped persons	This document contains the legal text explaining the requirements and application process by which a person with a mental or physical impairment may earn less than minimum wage.	**Strategic Goals and Operating Policies.**

Title of Document	Brief Description of Document	Related Elements
Department of Health and Social Services Chart of Personal Care Attendant and Waiver Service Rates	This document just contains the following link: http://dhss.alaska.gov/dsds/Documents/pdfs/PCA-service-waiver-rates201307.pdf. PDF document that charts the service units and rates, procedure codes, and waiver programs for the following services: personal care assistant services, care coordination, nursing oversight and care management, residential supported living, residential habilitation, intensive active treatment, others listed under "various", and respite.	The "Various" services category includes information about supported employment individual and group services and pre-employment services. **Financing and Contracting Methods**
Alaska Consortium of Tribal Vocational Rehabilitation and Department of Veterans Affairs Vocational Rehabilitation & Employment (Draft)	"This agreement to cooperate, coordinate, and collaborate is for the purpose of creating a powerful force within the rehabilitation community to increase vocational opportunities for Chapter 31 Disabled Veterans of Alaskan Native and American Indian heritage." The document contains a 2 page agreement outlining coordinated services, contractual agreements, exchange of expertise, personnel development, and the overall terms of the agreement between the two organizations (see Title column).	Specific to Alaskan Native and American Indian AMHTA beneficiaries; relevant to employment, specifically **Interagency Collaboration**, and **Leadership**
n/a	This document contains a list of the members of the Alaska Employment Initiative Management Team (which meets 4 times/year) and the members of the Alaska Employment Initiative Advisory Board (which meets twice a year). The lists contain the members' names, organization, and for some, city.	Interagency collaboration
Alaska Works Initiative: 2006-2010 Strategic Plan	This is the exact same document as the one labeled "2006_to_2010_AWI_Strategic_Plan.pdf" and titled "Alaska Works Initiative: 2006-2010 Strategic Plan" - described above	See above

Title of Document	Brief Description of Document	Related Elements
Trust Beneficiary Employment Initiative Work Group	Document contains a PowerPoint put together by ICI that reviews employment data from a variety of sources, including individual outcomes, service/funding, population data (ACS, CPS), Agency: administrative/MIS systems, UI quarterly wages, RSA 911, and Special Education Indicator 14. Data reviewed includes percentage of people employed in AK and nationally in different disability categories, hours worked per week in these different categories, percentage in integrated employment, voc rehab closures, and more.	
Alaska Work Investment Act Title 1-B, Annual Report, Program Year 2012	This report represents the activities of the Alaska Workforce Investment Board for the 2012 year. The AWIB "provides oversight for the planning and coordination of Alaska's workforce development system. The board identifies priority industries for which it recommends investment of public training funds." It also "has the responsibility to evaluate and recommend policy to implement the Workforce Investment Act." During PY 2012, the Board was awarded a Disability Employment Initiative grant "to improve education, training, and employment opportunities and outcomes of youth and adults who are unemployed and/or receiving Social Security disability benefits" (see pg 3). The report discusses the WIA adult program, dislocated worker program, youth program, veteran's services, state evaluation activities, and more.	

Title of Document	Brief Description of Document	Related Elements
Alaska Works Initiative Summit 2010 Agenda	Topics for discussion at the summit, according to the agenda, include "What we're doing, what we've learned" (which includes sub-topics "collaboration with business and industry", "transforming disability support programs", and "ensuring access to resources"), emerging trends and opportunities at the national and state level, sustainability, and priorities and next steps.	Consider agenda in conjunction with the other Alaska Works Initiative info. **Interagency Collaboration** and **Employment Performance Measurement, Quality Assurance, and Program Oversight.**
zip file contains two documents: "Fast Facts: Youth who exited the [state] VR program by age at application", one for Alaska and one for National data	The two documents, prepared by ICI and PIE, looked at integrated employment and VR data comparing individuals, ages 14-30, with and without intellectual disabilities. Data included in the documents address how many youth with ID and youth with other disabilities exited the VR program, percentage of youth who receive VR services, percentage of youth (with ID only) who gained integrated employment compared to percentage who received VR services, percentage of youth who reported special education or completion/attendance certificate at closure, cost of purchased services for closures, years from application to closure, age that youth exited VR with integrated employment, and hourly earnings and weekly work hours of youth who gained employment.	Performance measurement

Title of Document	Brief Description of Document	Related Elements
Employment Focus Area information— For 2-28-2014 AMHTA meeting	This document provides some Q&A about the Coordinated Resources Project (CRP), also known as the Anchorage Mental Health Court - "a 'voluntary' or 'problem-solving' court" that "hears cases involving individuals diagnosed with mental disabilities who are charged with criminal offenses and focuses on their treatment and rehabilitation." CRP participants work with case coordinators to develop an individualized treatment plan, including employment, which is seen by the CRP as a key strategy to reduce recidivism and enhance quality of life. The CRP reports that its data collection system is "in the process of identifying key data elements to collect" in additional the basic demographic info they already gather.	Relevant to Trust beneficiaries who have committed criminal offenses - **Interagency Collaboration** is a key element here, as well as Service **and Service Innovation** and **Leadership**. An area of need-**Employment Performance Measurement, Quality Assurance, and Program Oversight**
n/a	This document contains an email to Joe from Angela (Salerno?). It says "I am still in the state disability business, now with Senior and Disabilities Services. We administer four Medicaid waivers and the PCA program. I manage the Policy and Program Planning Unit and am the lead on policy and regulation planning. If you don't have our current regs you can find them on the SDS web at http://dhss.alaska.gov/dsds/Pages/regulationpac kage.aspx"	Relevant under **Financing and Contracting Methods**
Application for a 1915c Home and Community-Based Services Waiver	Alaska's [renewal] application for a 1915c Medicaid HCBS waiver. The proposed, and approved, effective date was in July 2011 and the waiver is effective for 5 years. The program title for this waiver is "People with Intellectual and Developmental Disabilities".	**Financing and Contracting Methods**

Title of Document	Brief Description of Document	Related Elements
Alaska Screening Tool FY2011 and Initial Client Status Review FY2011 (subtitle: Supporting clinical decision making and program performance measurement)	"This document describes how information provided by consumers in the Alaska Screening Tool 2011 (AST2011) may be used to inform the screening and assessment process" for clinicians and counselors. It contains detailed information about the Alaska Screening Tool (which screens for substance abuse, mental illness, co-occurring substance abuse and mental illness, traumatic brain injury (TBI), and Fetal Alcohol Spectrum Disorders), the Initial CSR (Client Status Review; looks at quality of life in the areas of health, safety, productive activity, and living with dignity), and how these combine to form the assessment process between client and counselor.	
Alaska Screen Tool AND Client Status Review	This document contains both the Alaska Screening Tool 2011 form and the Client Status Review form. Detailed descriptions of these tools and their clinical utility is provided in the document listed above ("AST CSR Clinical Decision Making 2011 slw 6 30 11.pdf")	
This zip file contains 2 files: "Data Collection Options - July 2009" and "Employment Outcome Data Collection Variables - January 2011"	These documents come from the State Employment Leadership Network. The 2009 document describes options for data collection and some pros/cons for each approach/. The 2011 document appears to describe outcome variables and demographics that either were measured or will be measured.	**Employment Performance Measurement, Quality Assurance, and Program Oversight.**
Developmental Disabilities (DD) Registration and Review	DD application forms. The form asks the applicant to consider community participation, living situation, and caregiver concerns as well as the level of need for supports and services in each area. It also asks the applicant to consider service needs, including supported employment.	**Services and Service Innovation.**

Title of Document	Brief Description of Document	Related Elements
Senior and Disabilities Services: Our Mission	The mission statement: "Senior and Disabilities Services promotes health, well being and safety for individuals with disabilities, seniors and vulnerable adults by facilitating access to quality services and supports that foster independence, personal choice and dignity."	Without an overt statement about employment, the "service principles" include an emphasis on self-determination, choice, and independence. **Leadership; Strategic Goals and Operating Policies.**
Individuals with Developmental Disabilities, Registration and Review Report (FY 2013)	Developmental Disabilities Registration and Review (DDRR; a document containing this form is also on Dropbox and is described above). This document contains 8 sections: the purpose of the DDRR, placement on the DDRR and criteria for ranking and selection, basic demographics, needs preferences and estimated costs to serve individuals on the registry, number of individuals selected or removed from the registry 2013, number of individuals on DDRR for more than 90 days and SDS review process, number of student with DD in Special Ed, and copies of reports/policies/manuals/procedures.	**Performance Measurement, Quality Assurance, and Program Oversight**
State Government as a Model Employer, February 8, 2008 Action Plan	This document describes how the state government of AK can serve as a model employer by hiring people with disabilities. The document describes the current status of AK's state govt in terms of hiring people with disabilities, taking into account the state's Provisional Hiring program as well as how hiring/recruiting trainings and resources do/do not include consideration of people with disabilities. Then, 7 recommendations are made.	**Leadership**, **Strategic Goals and Operating Policies**

Title of Document	Brief Description of Document	Related Elements
Alaska Training Program Performance 2012 (subtitle: Employment and Wages of Training Program Participants Exiting in FY2011)	This document was prepared by the Alaska Workforce Investment Board, the "lead planning and coordinating entity for Alaska's public workforce development system." The report "details the training programs and identifies the major providers resourced by state, federal, and private sector funds." Included in the report are a general overview and summary, assessment criteria, recommendations, and detailed reviews of training funds and training programs in AK.	Relevant to all HP elements, as well as **transition.**
n/a	AK DVR docs. These include: the DVR mission statement and principles; DVR Goals, Objectives, Strategies Final Draft January 2013; some screenshots of pages from the DVR website ("Jobseekers with Disabilities" page, "Examples of 4 Transition Bookmarks" page, and "Examples of 2 Transition Bookmarks " page); Youth Oriented Graphics for Career Fair Table-top Display; the Alaska DVR Policies CS 16.0 Transition Services and CS 12.0 Supported Employment; Service Definitions, Requirements, and Hourly Rate Range; ADVR personnel standards and staff development; and a few documents with handwritten titles: "RSA/Federal regs, Supportive employment", "RSA/DVR federal regs, supportive employment", and "Regs for DVR on Ed. Coordination".	Relevant to all HPSM elements, as well as **transition.**
DVR Referral Cover Sheet from Hope Community Resources	Contains a 1 page cover sheet signed by the director of supported employment at Hope Community Resources and written to DVR, asking DVR to determine whether or not the particular individual receiving services from HCR would benefit from DVR services.	Example of referral form from provider to DVR-relevant to contracting methods

Title of Document	Brief Description of Document	Related Elements
Interagency Agreement between The AK Dept of Education and Early Development and The AK Dept of Labor and Workforce Development	This document contains an interagency agreement (see title) specifically between the Division of Teaching and Learning Support and DVR. The purpose of the agreement is to "set forth the responsibilities of the TLS and the DVR in the provision of secondary transition services to individuals [with disabilities] ages 16 through 21". A list of the responsibilities of each agency is included. The term of the agreement is Jan 1, 2012 through June 30, 2017.	**Transition** and **Interagency Collaboration.**
Mission Statement	This document contains the mission statement of the Division of Teaching and Learning Support and the duties of TLS staff. The mission is, simply, "to improve student performance".	
State of Alaska, Dept of Health and Social Services, Grants and Contracts	Grant agreement for the supported employment project of Polaris House, Inc, located in Juneau, AK. The document includes two appendices: the grant application, and budget detail and narrative.	
Issues/Priorities at Alaska Works Initiative Summit 2010	This document contains bulleted notes about the issues and priorities discussed at the Alaska Works Initiative Summit in 2010. These issues and priorities fall under the following categories: Collaboration with business and industry, Transforming disability support programs, and Ensuring access to resources.	Consider in conjunction with the other Alaska Works Initiative documents. **Interagency collaboration; employment performance measurement, quality assurance, & program oversight; training and technical assistance;** and **services and service innovation. Transition.**

Title of Document	Brief Description of Document	Related Elements
State of Alaska, Dept of Health and Social Services, FY13 Quarterly Narrative Report, Supported Employment	Document contains the FY13 quarterly report (for the third quarter) for Frontier Community Services' supported employment program. The report includes the total number of individuals receiving supported employment services, number of new enrollees/referrals, total employed, number attaining employment this quarter, and number of cases being jointly served by DVR. Types of employment are looked at as well (full or part time/seasonal/day labor). The report also contains a chart of the outcomes, indicators, and data collection strategies and specific ways the agency is meeting/accomplishing these during this quarter. Also included is a list of businesses contacted by the agency and a narrative signed by two disability employment specialists at the agency detailing some of the specific work that was done this quarter, including areas in which clients have found employment and other tasks (e.g. interview clothing, social security questions, drivers licenses, etc) that they assisted clients with.	**Employment Performance Measurement, Quality Assurance, and Program Oversight.** - example of data submitted from employment provider
Funding for supported employment services - Recommendations for change (Alaska Integrated Employment Initiative Policy Workgroup)	Issue- home and community-based Medicaid waiver services are billed in 15min increments for every hour of service provided for both job coaching and stabilization and long-term services, resulting in the unintended consequence of staff being "glued to" the individual and him/her often not being trained to do the job independently or to utilize the natural supports at the workplace. A series of recommendations are offered to address this problem, as well as a rationale for the recommendations and some key definitions ("job placement assistance/job development services", job coaching services", and "stabilization and long-term services"). how to "fade"	**Training and Technical Assistance; Funding and Contracting Methods**

Title of Document	Brief Description of Document	Related Elements
(zip file containing 3 documents)	This zip file contains 3 documents. The first is the Intro/Method/Participants for the Future of Disability Alaska summit and subsequent survey. This document provides an overview of the process and introduces the 5 topical areas: housing arrangements, advocacy, relationships, economic well-being, and health. The second document is an elaboration on the fourth topical area: Economic Well-Being. This document includes a vision, priority statements, and suggested strategies. The third document is Universal Themes: What improvements could have impact across areas? The themes identified include: transportation, inclusion, advocacy, equality, accessibility, choice, flexibility, safety, and public awareness.	Focus on document re: Economic Well-Being. **Strategic Goals and Operating Policies, Employment Performance Measurement, Quality Assurance, and Program Oversight,** and maybe **Services and Service Innovation.**
Post-School Outcomes Survey	This is a survey of Post-School Outcomes, containing an employment section and a secondary education section. The employment section asks about the former student's current employment status, including details about where the job is, wages, and hours. The postsecondary education sections ask about current or past enrollment in any type of school, training, or education program.	**Employment Performance Measurement, Quality Assurance, and Program Oversight** and **transition**
n/a	Copy of an email containing the link http://dhss.alaska.gov/dsds/Pages/info/approved forms.aspx which links to a page titled "approved SDS forms"	

Title of Document	Brief Description of Document	Related Elements
Memorandum of Understanding between AK DVR and AK Div of Behavioral Health	Signed by the directors of AK DVR and AK Division of Behavioral Health, states a commitment to employment as a priority outcome/expectation for both agencies, to providing services based on best evidence available, and to ongoing examination and review.	**Interagency Collaboration, Leadership, Strategic Goals and Operating Policies,** and **Employment Performance Measurement, Quality Assurance, and Program Oversight.**
(zip file containing 2 documents)	This zip file contains 2 documents about the Polaris House Supported Employment Program. The first document includes an abstract the briefly describes the program, a detailed budget, program narrative, and the second continues with the 11 appendices under the title "qualification" (which are part of the table of contents in the first document). The second document begins with the Polaris House's "FY11 Logic Model Quarterly Report" for the 3rd quarter.	Seems relevant. Categorize under **Services and Service Innovation** as well as perhaps **Interagency Collaboration, Financing and Contracting Methods,** and **Employment Performance Measurement, Quality Assurance, and Program Oversight.**
	This contains the first of the 2 documents in the zip file described above titled "POLARIS EMPLOYMENT GRAN… DBH.zip"	
	This contains the second of the 2 documents in the zip file described above titled "POLARIS EMPLOYMENT GRAN… DBH.zip"	
Alaska Population Overview (2012 Estimates)	Document contains a report about AK's population, including 4 chapters containing "2011 and 2012 population estimates for the state and its boroughs, census areas, and places as well as information from the 2010 Census. This overview's population concepts and definitions are the same as those the US Census Bureau uses."	

Title of Document	Brief Description of Document	Related Elements
Workplace Survey Results: State of Alaska as Model Employer of People with Disabilities	See document titled in dropbox as "Disability_Employment_Policy_Summit.pdf" (from 2008) - it describes how the state government of AK can serve as a model employer by hiring people with disabilities and makes recommendations for doing so. THIS document (from 2013) is a summary and report of how the State of AK actually implemented some of these recommendations and the results of doing so.	**Leadership**, **Strategic Goals and Operating Policies** as well. Also, **Employment performance measurement, quality assurance, and program oversight.**
SDS Plan of Care (form)	This plan of care form asks the responder to complete items in the following sections: Information (includes POC type by waiver, address, legal representative of the recipient, etc), Diagnosis and Medical, Personal Profile (including personal goal), Summary of Non-Waiver Supports and Services, Summary of Non-Habilitative Waiver Services, Summary of Habilitative Waiver Services, Out-Of-Home Residential Services, Planning Team, Grant Funded Agreement, and Signatures	**Services and Service Innovation** and **Funding and Contracting Methods**
Massachusetts Employment and Disability Snapshot Report 2006	"This is the third in an annual series of snapshot reports on the employment of people with disabilities in Massachusetts developed by the Medicaid Infrastructure and Comprehensive Employment Opportunities (MI-CEO) grant. It is intended to provide people with disabilities, advocates, policymakers, researchers, and other interested parties an overview of the status and trends in employment of people with disabilities." Developed by the ICI. Includes definition of employment.	Model for reporting data - performance measurement

Title of Document	Brief Description of Document	Related Elements
Supported Employment Services Conditions of Participation	DRAFT. Covers 3 areas: Program administration, Program operation, and Supported Employment Services Plan.	**Training and Technical Assistance** and **Services and Service Innovation. Strategic Goals and Operating Policies** and **Financing and Contracting Methods.**
Alaska State Vocational Rehabilitation Committee, 2013 Annual Report	In Alaska, the Alaska State Vocational Rehabilitation Committee (SVRC) "functions as the State Rehabilitation Council. [This] report highlights the activities of the SVRC and of the Alaska Division of Vocational Rehabilitation in the provision of quality vocational rehabilitation services to individuals with disabilities throughout Alaska." The report includes a list of committee members, strategic plan with 4 goals, data about DVR (including FY13 outcomes, who DVR serves, and results of a customer satisfaction survey), and more.	**Services and Service Innovation, Employment performance measurement, quality assurance, and program oversight,** and **Strategic Goals and Operating Policies.**
Data in Preparation for the Site Visit to Alaska, March 2014	Data a focused primarily on transition age youth and VR.	
March 2014 Unemployment Rate, Not Seasonally Adjusted	Document contains a map of AK, colored into 4 categorizes to represent the Unemployment Rate Range. Statement at the bottom says "The statewide unemployment rate for March 2014 is 7.4 percent."	

Title of Document	Brief Description of Document	Related Elements
Dept of Health and Social Services, Chart of Personal Care Attendant and Waiver Service Rates (2012?)	In this document: "The following are Medicaid payment rates for specified Personal Care Attendant and Waiver Services. This chart does not cover all services reimbursed by Medicaid for Waiver Services. For services not covered here the controlling regulation should be consulted (example: Specialized Medical Equipment, Environmental Modifications, or Specialized Private Duty Nursing). "Waiver programs include Alaskans Living Independently, Adults with Physical and Developmental Disabilities, Children with Complex Medical Conditions, and Intellectual and Developmental Disabilities. **NOTE**: in the dropbox title, it says 2013, but in the document itself it says 2012	**Financing and Contracting Methods**
Dept of Health and Social Services, Chart of Personal Care Attendant and Waiver Service Rates (2014)	This is the same document as the one titled "Waiver rates 01-2013 draft.pdf" but applies to a different year - 2014 rather than 2012.	Financing and Contracting Methods
Chapter 130 Medicaid Coverage; Home and Community-Based Waiver Services, Article 2: Home and Community-Based Waiver Services; Nursing Facility and ICF/MR Level of Care	Section 270 covers Supported Employment Services -	**Strategic Goals and Operating Policies** and/or **Financing and Contracting Methods.**

Appendix C

Beneficiary Employment Initiative Stakeholder Planning Meeting

Action plan options

Friday brainstorming

5/30/2014

Capacity building

Top 3:

- Standardized competency based training **(4 votes)**
    o Everyone gets the same training and competencies
    o Core competencies around employment (adapted from APSE)
    o Regional needs addressed
    o Interagency training team (CBC model)
    o Ongoing/cycled schedule of training
- One stop location for resources updated annually **(0 votes)**
    o List of resources
    o Toolkits
    o Policy directory
    o Tap into disability and aging center infrastructure
- Capacity building committee **(5 votes)**
    o SWAT team of expert practitioners
    o Coordinate
    o List serve updates
    o Recurring needs assessment

Additional options:

- List of standard training
- Identify agencies that have similar training needs
- Develop a cycle of training
- Develop a calendar of training
- Identify training models
- Offer training and TA funding/scholarships for individuals and organizations
- Offer more opportunities for other experienced training entities to offer training to organizations
- Training in rural hub areas on finding and services for beneficiaries, parents, and service providers from outer villages
- Transition training in the schools for parents and students

- List organizations
- List/get to know individuals in various communities that are practice
- What subtopics are most relevant – standardized/regionalized
- Where's the money?
- List desired outcomes

Goals and Operating Policy

Top 3:

- State leadership buy-in **(8 votes)**
  - o Annual goals by agency
  - o Plans at agency and provider levels
  - o Annual report
  - o Supported employment coordinator in each agency
- Operating systems that are user friendly **(0 votes)**
- Common employment definitions and data **(7 votes)**
- Develop a sustainability plan **(9 votes)**

Additional options:

- Planning for work first mandate
- Planning for the "work first" mandate
- Standards/qualifications certification across systems for providers
- Concept of hiring people with disabilities vs. actually hiring a person with a disability
- Framework for moving through the cross-agency employment system
- State agencies an nonprofit associations (Peer Consortium, ABIN) work to have their plans complement and coordinate with each other as related to employment
  - o Goals use common language with common definitions
  - o Common measurements
- There is a navigator or a liaison to help get state agencies to talk with non-profit agencies
- Increase the value put on the feedback we get from businesses
- Procedure to implement employment first for all disabilities
- Standardization for job developers
- Within DBH, have a mandate that providers include employment outcomes in treatment plans
- State agencies coordinate/collaborate within departments to train staff and providers on employment for persons with disabilities
- DBH – client status review needs to be updated (more employment)
- Capture long term data so we can show funders how it impacts our society, economy, and individuals (10, 15, 20 years of data)
- Include sustainability in the plan. The Trust is in charge now, but how will we keep this going? Who will corral the agencies?
- State incentivizes MOUs to be functional documents tied to outcomes with deadlines. These would be reported on quarterly. Otherwise MOUs are a waste of paper.

- Use Alaska peer support workers or consortium to act as independent advocacy group. Bring peers from all organizations to talk about what is and is not working.
- Cross training new staff at the state level in a minimum of two other state offices: i.e. DVR with DOL and DBH with a 90 day or 6 month performance goal of maintaining contact with the training cohort.

Funding and contracting

Top 3:

- Develop/submit a 1915i state plan for home and community based services that is employment focused **(6 votes)**
- Develop system/strategy for describing return on investment **(2 votes)**
  - Service cost
  - Other costs (health care, etc.)
- Provide training on underused resources (PASS, Ticket, CRP status with DVR and how to access DVR) **(6 votes)**

Additional options:

- Joint legislative request for funds specifically for long-term employment supports. What outcomes?
- Reallocation of existing funds such as less day hab or day treatment, more long term employment supports
- Info/training for providers on underutilized
- Joint federal applications – more upfront focus on sustainability
- Pay more for employment services than for day hab or day treatment
- Trust support for agencies becoming certified/accredited
- Leverage REACH expenditures in community
- Alaskan Business Journal
- Help providers know what services cost
- Trust support to leverage other resources (Rasmunson, At-Su Communities, Foundations, …
- Create a monthly cost unit to pay for customized employment
- Address disincentives to employment for people in assistive living homes – can only retain $100/month.
- Funding new staff to the agency
- Stable funding from fiscal year to fiscal year
- Not cutting funds or transferring funds each year
- Individualized grant applications and reports to lead to individual contracts with providers for customized outcomes for populations served.
- Funding the unfunded mandates given focus by other agencies
- Shortfalls of contract funding
- Benchmark or milestone payments

- What is the best option for streamlining contracts and grants (address issue of fewer dollars)? RFPs are overwhelming with short deadlines. Contracts are long and filled with legal requirements.
- MHTA should employer a commissioner level person to facilitate the Employment First implementation
- Align outcomes across agencies regardless of funding source
- Structure grant and contract language to focus on employment
- Se consistent and reasonable administrative rates.
- Streamline state wide grant making process
- Look at SDS regulations on supported employment and male recommendation that move agencies from day hab model to supported employment
- Het "Joes" cabinet going
- Define employment, pre-employment, supported employment, customized employment
- Make intersect between ICB center/DOL with rest of service system
- Bring disability employment conference back
- Define outcomes as same across SDS, DVR, DOL, DBH
- State agencies pay more for employment services vs. day hab
- Get Trust to leverage their $1 million for other private/public funds

Service innovation

Top 3

- Put prevocational services into systems to lead into the DVR process **(3 votes)**
- More probation officers that understand mental health **(1 vote)**
    o Positive, proactive, constructive services rather than reactive
- More concentrated training for job development with outside "sales" personality characteristics **(8 votes)**

Additional options:

- Distance service delivery portals (like TeleMed)
- Pooling agency funds for cross training between agencies
- All training followed by or including implementation support
- Model for interagency collaboration for transition youth agreed upon by SDS, DBH, DVR, DEED
    o Start at 10th grade (prevoc)
    o Job by Junior year
- Require discovery (refined for each geographic area) by training secondary special education teachers
- Expand Medicaid services
- Rural pilot program in a small bush community to prepare for employment
- Legislation requiring transition coordinators
- Interagency collaboration on a monthly basis
- Statewide agency training about employment

- Develop a matrix of who provides services showing overlap and making a tiered plan for other agencies
- Discovery for everyone
- Skill building
- Funding transitional living specialists
- Adapting the discovery model for Alaska
- Transitional living support model specific to BI that includes employment
- More customized employment and have CE better recognized at DVR
- Outcomes of service delivery tracking
- More support for individuals in self employment that is sustainable
- Work toward building social capitol with individuals
- Engaging employers in meaningful ways
- Better trained job developers and coaches
- Expanded Medicaid services
- Increased funding for and access to these services
- Better understanding of "good" rehab. Rome wasn't built in a day, and an IPW shouldn't be either
- MH probation officer in DOL
- Discovery process expanded for students in schools and other individuals with disabilities
- Expanded prevocational skills
- Support/expand role of DVR with transition age youth
- Develop policy/procedure of DVR with schools
- Team concept between schools and agencies
- Expand Project Search to non IDD populations and find ways to address more clients
- Train teachers in discovery process
- Increase qualifications for employment provider
- Transition coordinator as part of teacher training
- Self employment
- Customized employment including discovery
- Peer to peer/TLS
- More interagency provider sharing/coordination
- Tapestry program at UAA
- More flexibility in waiver funding categories to avoid unnecessary paperwork
- Specialization in service delivery for higher/special category needs. Tie to higher reimbursement rates.
- More seamless referral process SDS/waiver to DVR and back
- Building prevocational skills. Need funding source to provide
- Long term supports
- Customized employment
- Transition living specialist
- Peer employment specialists
- SDS taking on long term support
- Business within a business
- More concentrated job development. Job carving, funding that supports

Interagency Collaboration

Top 3:

- Interagency training academies on employment – bring them back **(13 votes)**
    - o Academy for special education teachers
- Create a one stop place for clearinghouse for policies, definitions **(0 votes)**
- Use resources more wisely for training **(5 votes)**
    - o Structuring leadership and stakeholder focus

Additional options:

- Cross agency policy examination. Have someone examine all the policies and perceptions
- Reinvigorate the joint agency training academies
    - o Include academies for DEI, special education
- Level of compensatory understanding of one another's function. We need a way to teach each other.
- Cutting time between referrals
- Put initiatives out on AWB
- Success stories. Project X, networking, team concept
- Targeted job clubs
    - o SDS, DVR, IL
- Hire a statewide employment coordinator
- Hire more staff devoted to employment
- Have monthly gathering to triage plans
- Write MOAs
    - o MOAs with increased clarity
- Regular scheduled meetings
    - o Map out specific responsibilities and any gaps
- Confirm perceptions of different departments
- Seek out more/increased stakeholder support. Top-level commissioners?
- Set goals and require systems to account for them
- Brainstorm how to get these resources to front line folks
- Put initiative in front of AW1B for inclusion in agenda and employment committee
- Highlight best practices
- Success stories and look for model for success
- Joint job fair planning

Not addressed and other issues

- Peer supports is a billable DBH service
- Assisted living (ALH). DPA customers are only allowed to keep $100/month. Needs to be a path out.
- Need consistent training for DBH providers
    - Discovery
    - IPS
- Re-entry: Mentors, housing, plan
- Dual diagnosis and culturally relevant treatment including language barriers
- Better collaboration for agencies working with offenders for re-entry
- Person within prison system that works with Trust beneficiaries. Contact with prison system in developing re-entry plan.
- Quality of staff issues: not showing up, not leaving right away. Need to set higher rate of pay
- Agencies working together on transition services
- Support for transitioning from job to job
- Opportunity: DVR, DSDS, DBH, others working together for business outreach
- Agencies knowing what each other does and less duplication
- Monthly unit rate for customized employment
- Specialty case management
- How get businesses involved? Outreach, make sure they know what kinds of supports they can receive
- Businesses required to take disability awareness webinar as condition of receiving a new or renewal business license

Appendix D

Employment Outcomes and Services Data Summaries

Employment outcomes summary: Alaska March 2014

Youth who exited the state VR program, by age at application. Alaska

Youth who exited the state VR program, by age at application. Nation

Vocational Rehabilitation, youth age 16 to 30 at application.
Individuals with an intellectual, substance abuse, or mental health disability

Employment Outcomes Summary

Alaska

March 2014

Institute for Community Inclusion/UCEDD
University of Massachusetts Boston
100 Morrissey Boulevard
Boston, Massachusetts 02125
www.communityinclusion.org
www.StateData.info
http://www.selnmembers.org/

Data Sources

American Community Survey

Employment Rate. The percent of working-age (civilian non-institutionalized 16-64 years old) individuals who have a job.

Disability categories. The American Community Survey classifies individuals as having a disability based on presence of a long lasting condition in two categories:
Visual disability - Blindness or a severe vision impairment
Hearing disability - Deafness, or a severe hearing impairment
Physical disability - Substantial limitation in the ability to perform basic physical activities, such as walking, climbing stairs, reaching, lifting, or carrying
Or the presence of a physical, mental, or emotional condition lasting six months or more that leads to:
Cognitive disability - Difficulty learning, remembering, or concentrating
Self-Care disability - Difficulty dressing, bathing, or getting around inside the home

State ID/DD Agency

Data source: ICI's ID/DD Agency National Survey of Day and Employment Outcomes*.* Collected annually, this survey collects summary data on distribution of services and funding of day and employment services at the state level.

Service Definitions:

	Service type: Work	Service type: Non-Work
Setting: Community	**Integrated employment**: Services that are provided in a community setting and involve paid employment of the participant. Specifically integrated employment includes: *competitive employment, individual supported employment, group supported employment, and self-employment supports.*	**Community-based non-work**: Includes all services that are focused on supporting people with disabilities to access community activities in settings where most people <u>do not</u> have disabilities. Does not include paid employment.
Setting: Facility	**Facility-based work**: Includes all employment services which occur in a setting where the majority of employees have a disability. These activities occur in settings where continuous job-related supports and supervision are provided to all workers with disabilities. This service category is typically referred to as a Sheltered Workshop, Work Activity Center, or Extended Employment program.	**Facility-based non-work**: All services that are located in a setting where the majority of participants have a disability and does not involve paid employment of the participant.

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Data Sources

State Mental Health Agency Data
Data Source: The Center for Mental Health Services (CMHS) Uniform Reporting System (URS) data tables

Data Elements/Definitions:
•Number of Adults Served who have a Known Employment Status - This is a subset of all consumers who receive State Mental Health Agency services.
•Number of Mental Health Services Consumers who are part of the Labor Force - Persons in the labor force are either employed or unemployed and looking for work.
•Number of Mental Health Services Consumers who are employed.
•Percentage of all State Mental Health Agency consumers served in the community who are employed.

Vocational Rehabilitation (VR) Agency.

Data Source: Rehabilitation Services Administration (RSA) 911. This public access database captures individual characteristics, services, and employment outcomes information at the point of closure from VR services. Records are at the individual level covering approximately 600,000 case closures per year.

Closure with ID – Any individual whose case record indicates they cause of their primary of secondary impairment to employment was a physical disability

Closure with MH – Any individual whose case record indicates their primary impairment to employment is Psychosocial and the cause of that impairment is one of the following: anxiety disorders, depressive or other mood disorders, mental illness (not listed elsewhere), personality disorders, or Schizophrenia and other psychotic disorders

Closure with SA– Any individual whose case record indicates their primary impairment to employment is Psychosocial and the cause of that impairment is alcohol or drug dependence or abuse

Closed with a Job (formerly Status 26) includes competitive employment (including supported employment), self-employment, state agency managed business enterprise, homemaker, and unpaid family worker).

Closed without a Job (formerly Status 28) includes all clients who closed without an employment outcome after an Individualized Plan for Employment (IPE) was completed and implemented by the state VR agency. Includes sheltered work.
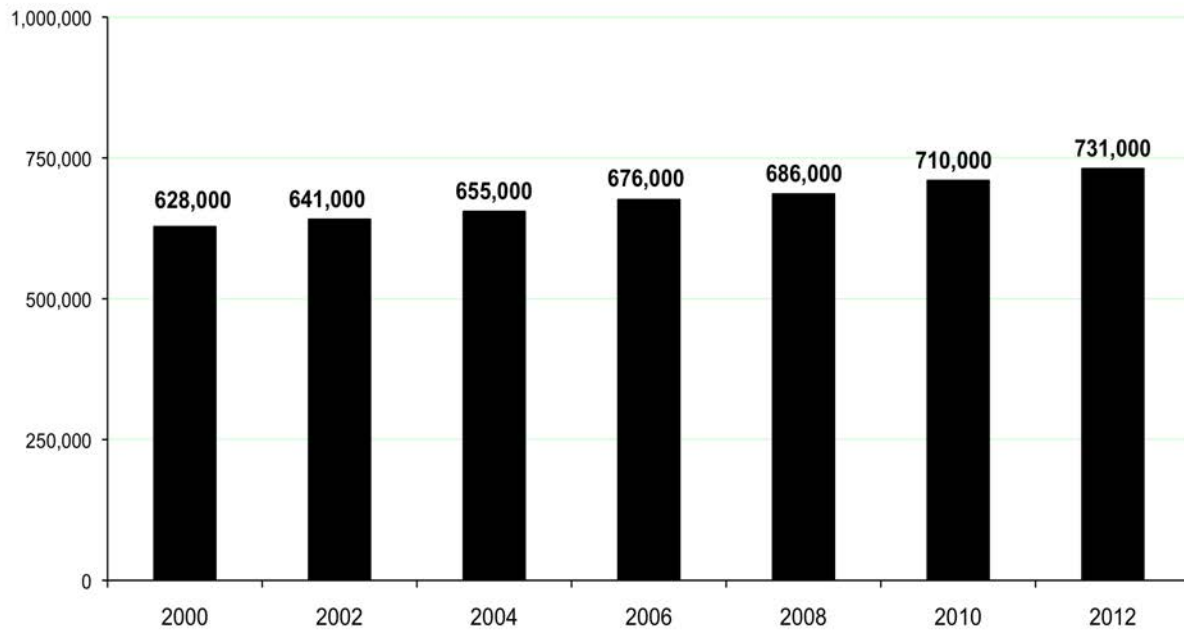
Rehabilitation Rate: The percent of individuals receiving services who achieve a successful rehabilitation. Calculated as: Closed with a job (status 26) / closed with a job + closed without a job after receiving services as part of an IPE (statuses 26 + 28).
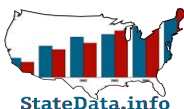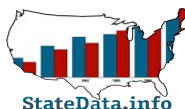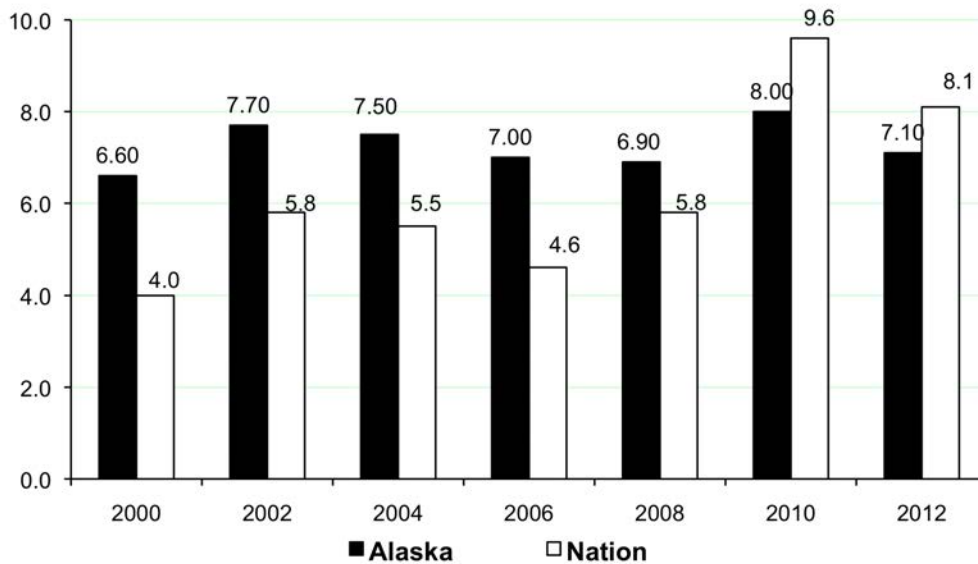
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State Demographics

Alaska Population

Unemployment Rate

Percent of employable people who are not employed and actively seeking work, out
of the total number of employable people
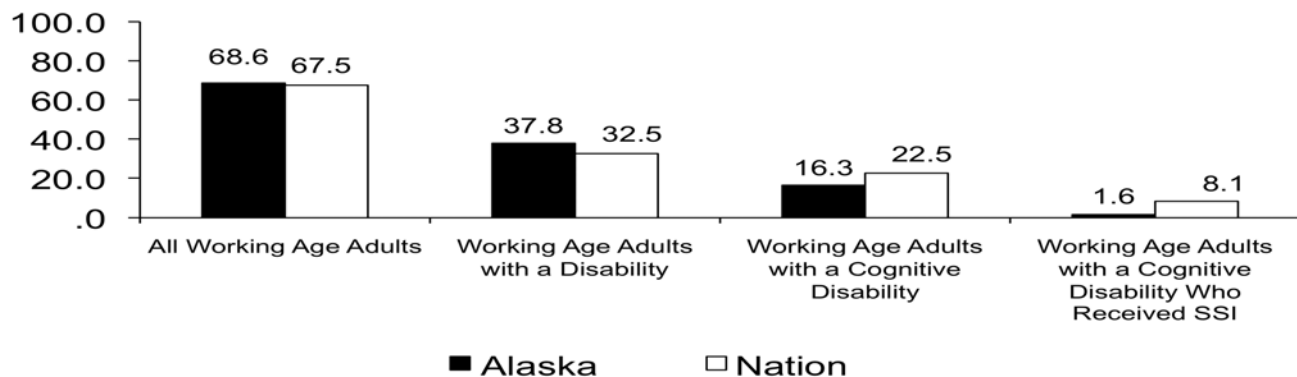

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4

2012 American Community Survey
All data is for non-institutionalized working-age people

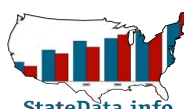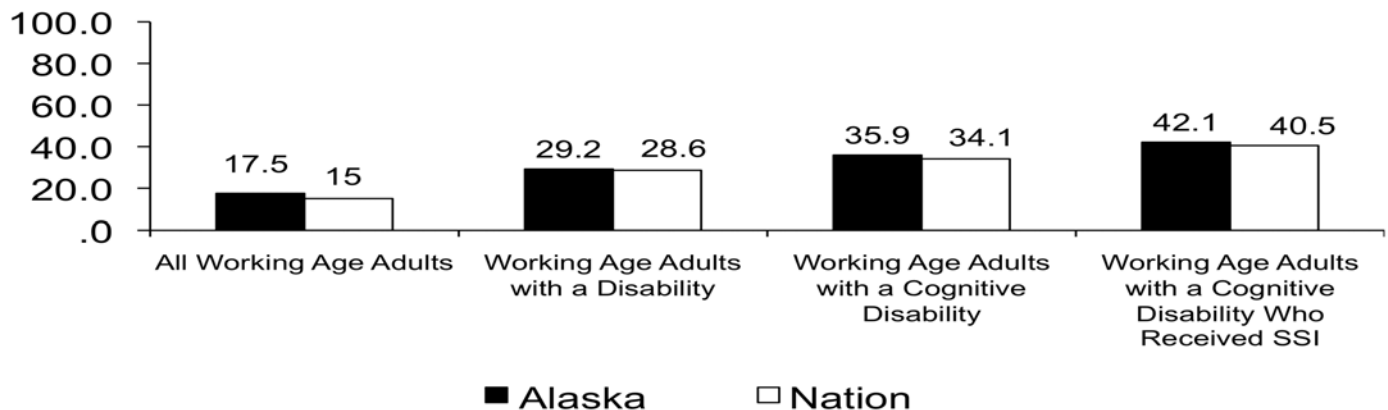## Prevalence of Disability, Employment Participation, and Poverty

Population Summary

Group	National		Alaska	
	Number	Percent	Number	Percent
Non-institutionalized population 16-64	201851,735	100.0%	487,263	100.0%
Any Disability	20,062,920	9.9	48,742	10.0
Cognitive	8,579,564	4.3	17,635	3.6
Physical	10,051,691	5.0	22,375	4.6
Hearing	3,973,578	2.0	17,929	3.7
Visual	3,482,919	1.7	11,453	2.4
Self-Care	3,647,572	1.8	9,210	1.9
Independent living	7,157,431	3.5	12,969	2.7

Employment Rate in Alaska
The percent of working-age individuals who have a job

	Alaska	Nation
All Working Age Adults	68.6	67.5
Working Age Adults with a Disability	37.8	32.5
Working Age Adults with a Cognitive Disability	16.3	22.5
Working Age Adults with a Cognitive Disability Who Received SSI	1.6	8.1

Poverty Rate in Alaska

	Alaska	Nation
All Working Age Adults	17.5	15
Working Age Adults with a Disability	29.2	28.6
Working Age Adults with a Cognitive Disability	35.9	34.1
Working Age Adults with a Cognitive Disability Who Received SSI	42.1	40.5

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Alaska
Senior and Disabilities Services

Number in Day and Employment Services by Setting
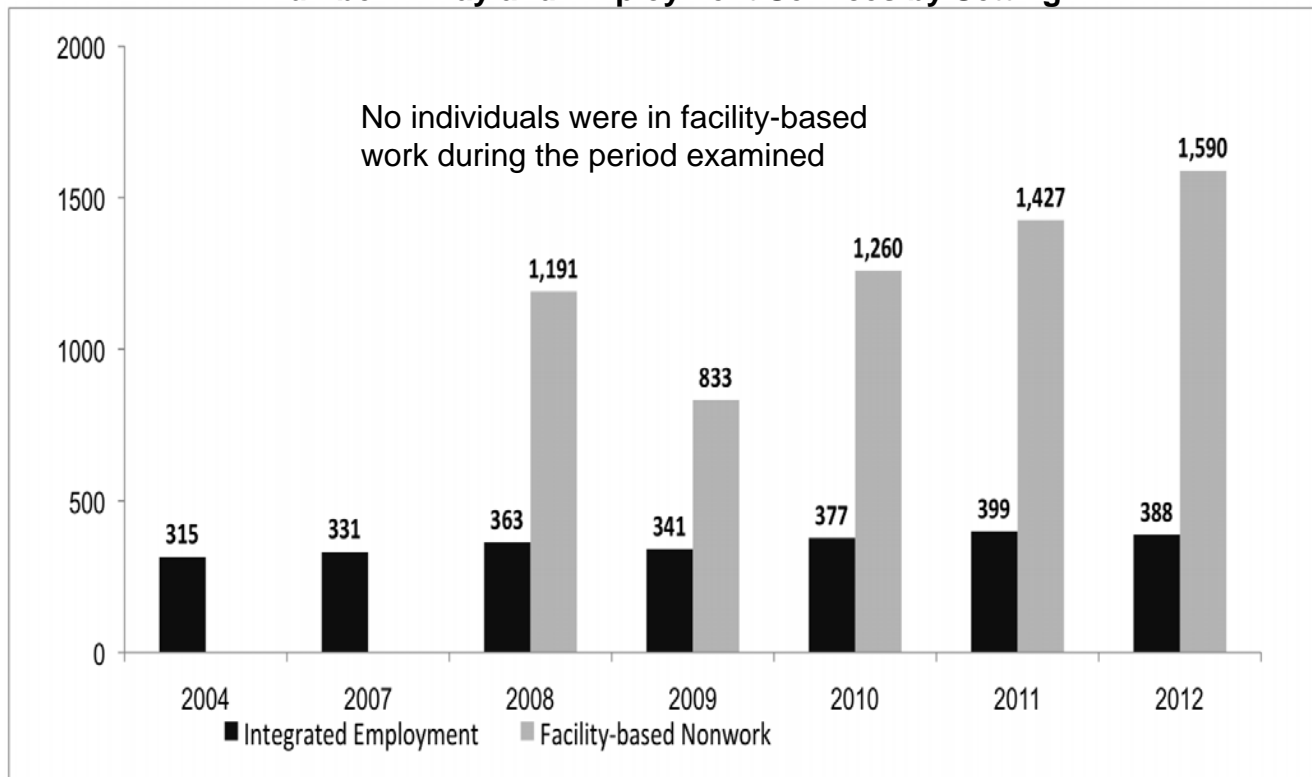
	FY2004	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012
Total served	768	1,394	1,554	1,174	1,360	1,506	1,641
Integrated Employment	315	331	363	341	377	399	388
Facility-Based Work	0	0	0	.	0	0	0
Facility-based Non work	0	0	1,191	833	1,260	1,427	1,590
Community-based Non work	453	760	0	.	0	0	0

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Alaska
Senior and Disabilities Services

Day and Employment Spending by Setting (in 1,000s of Dollars)

	Integrated Employment	Facility-based Work	Facility-based Nonwork	Community-based Nonwork
FY04	3,915	0	0	6,406
FY07	3,855	0	0	12,229
FY08	3,483	0	13,454	0
FY09	3,249	0	14,017	0
FY10	5,238	0	22,906	0
FY11	5,576	0	27,426	0
FY12	6,177	0	34,029	0

Day and Employment Funding by Source (in 1,000s of Dollars)

	Total	Title XX	Title XIX	Title XIX Waiver	State, County, Local
FY04	10,322	0	0	10,322	0
FY07	18,606	0	0	18,606	0
FY08	16,937	0	0	16,937	0
FY09	17,266	0	0	17,266	0
FY10	28,144	0	0	28,144	0
FY11	33,002	0	0	0	0
FY12	40,206	0	0	0	0
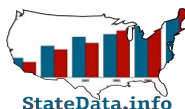
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Alaska
Senior and Disabilities Services

Distribution of Services

* Includes sheltered employment and related facility-based work
  models, facility-based non-work and community-based non-work.
  Services in this chart may not sum to 100% due to duplication of services

Alaska
Division of Behavioral Health Services

Employment Outcomes for Consumers of Mental Health Agency Services (Data for FYs 2008, 2010, 2011 were not reported)

	FY2004	FY2005	FY2006	FY2007	FY2009	FY2012
Consumers in the Labor Force	4,855	Data not available			3,846	4,854
Consumers with a Known Employment Status	9,865	1,693	1,325	3,405	6,256	8,311
Consumers Who Are Employed	3,475	712	585	2,817	2,014	2,377
% Consumers with a Known Employment Status Who Are Employed	35%	42%	44%	83%	32%	29%

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StateData.info

Alaska
Division of Vocational Rehabilitation

	FY2008	FY2009	FY2010	FY2011	FY2012
All VR Case Closures	1,492	1,590	1,711	1,879	1,821
# Closed with Job	568	524	530	634	641
# Closed Without Job	295	323	339	337	362
Rehabilitation Rate*	65.8%	61.9%	61.0%	65.3%	63.9%
Closures with ID	82	71	49	61	72
Percent of All Closures	5.5%	4.5%	2.9%	3.2%	4.0%
# Closed with Job	39	33	24	28	33
# Closed Without Job	14	16	12	12	19
Rehabilitation Rate*	73.6%	67.3%	66.7%	70.0%	63.5%
Closures with MH	150	156	188	216	222
Percent of All Closures	10.1%	9.8%	11.0%	11.5%	12.2%
# Closed with Job	47	48	49	75	62
# Closed Without Job	28	35	33	43	35
Rehabilitation Rate*	62.7%	57.8%	59.8%	63.6%	63.9%
Closures with SA	163	198	265	319	316
Percent of All Closures	10.9%	12.5%	15.5%	17.0%	17.4%
# Closed with Job	66	63	85	109	126
# Closed Without Job	31	33	30	43	56
Rehabilitation Rate*	68.0%	65.6%	73.9%	7.17%	69.2%

*Rehabilitation Rate=(# Closed with a job)/(# Closed with a job + # Closed without a job AKA Status 28, after IPE written)

**Successful Rehabilitations (Closed with a Job) for People with ID, MH, and SA:**
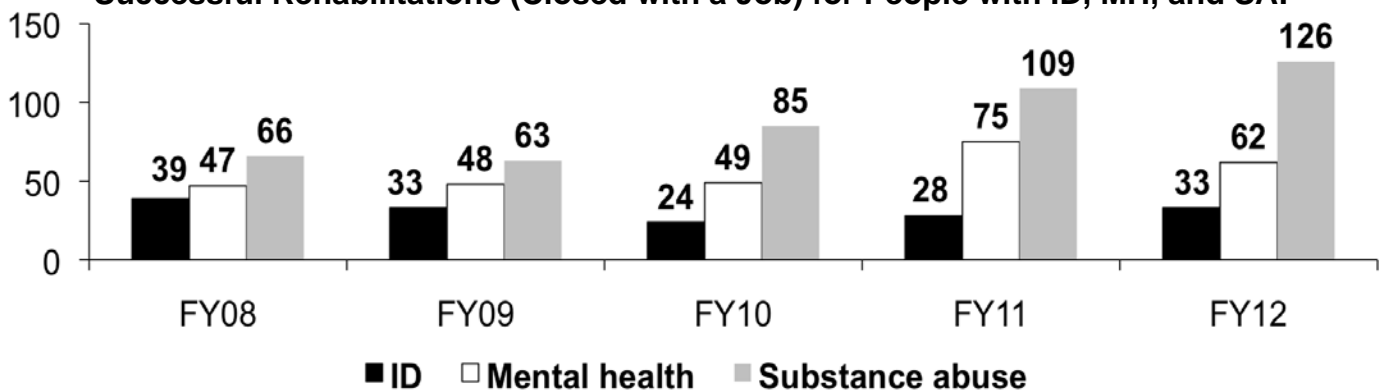
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Alaska
Division of Vocational Rehabilitation

	FY2008	FY2009	FY2010	FY2011	FY2012
Alaska					
All Closures	$469	$441	$474	$485	$457
ID Closures	$177	$209	$159	$150	$189
MH Closures	$463	$387	$361	$445	$445
SA Closures	$520	$508	$580	$542	$526
Nation					
All Closures	$363	$357	$355	$355	$359
ID Closures	$188	$187	$193	$196	$199
MH Closures	$316	$311	$312	$318	$320
SA Closures	$390	$382	$383	$391	$398

Mean Hours Worked at Closure

	FY2008	FY2009	FY2010	FY2011	FY2012
Alaska					
All Closures	32.8	31.3	31.8	32.4	32.2
ID Closures	18.9	20.7	18.0	17.3	18.1
MH Closures	33.6	28.9	28.8	31.6	30.8
SA Closures	36.7	37.1	38.0	37.6	38.1
Nation					
All Closures	31.6	30.6	30.3	30.4	30.3
ID Closures	24.6	23.7	23.5	23.7	23.6
MH Closures	30.4	29.6	29.5	29.8	29.7
SA Closures	36.9	35.8	35.3	35.4	35.2
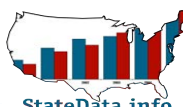
Institute for Community Inclusion

Fast Facts: Youth who exited the state VR program, by age at application. Alaska

Data source: RSA911, FY2012, Alaska
Target population: People with intellectual disabilities (ID) vs. people with other disabilities. A person with ID is someone for whom code 25 (mental retardation in the RSA-911 dataset) was reported as the cause of either a primary or secondary impairment to employment.
Age group: 14-30
Employment: Employment is defined as full-time or part-time employment in an integrated setting with or without ongoing support services.

Table of content

Figure 1. How many youth with ID exited the VR program, by age at application?

Age at application

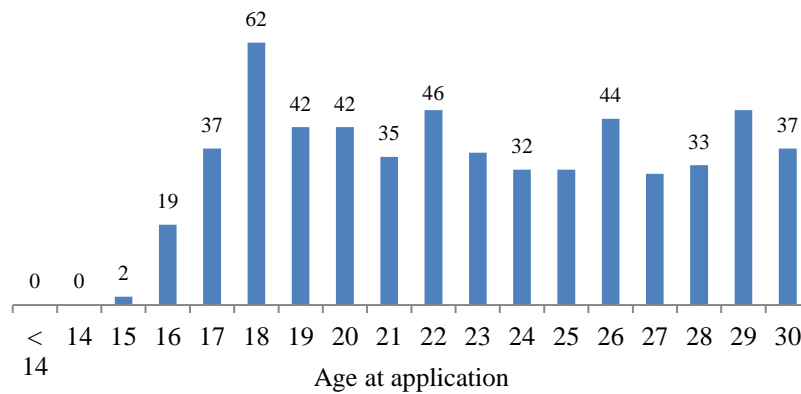**Figure 2. How many youth with other disabilities exited the VR program, by age at application?**

Age at application

Figure 3. What percentage of youth received VR services?

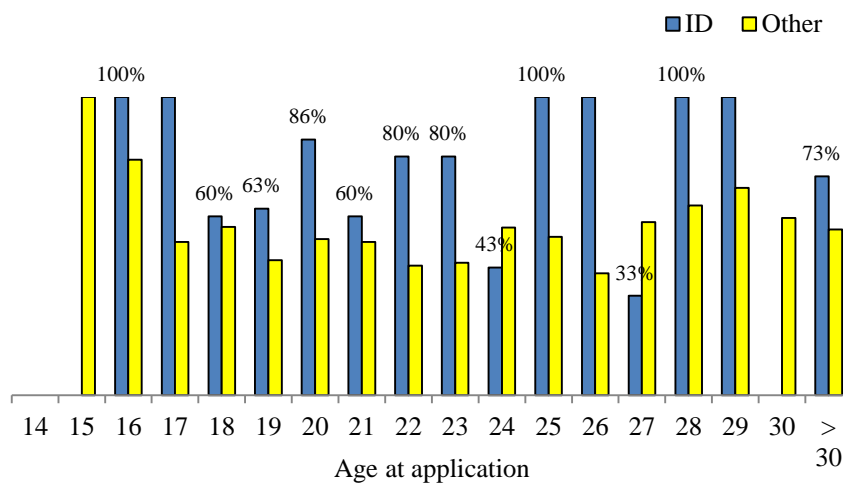
Age at application

partnerships in employment

2

Figure 4. What percentage of youth gained integrated employment, compared to the percentage of youth who received services? Youth with ID only.
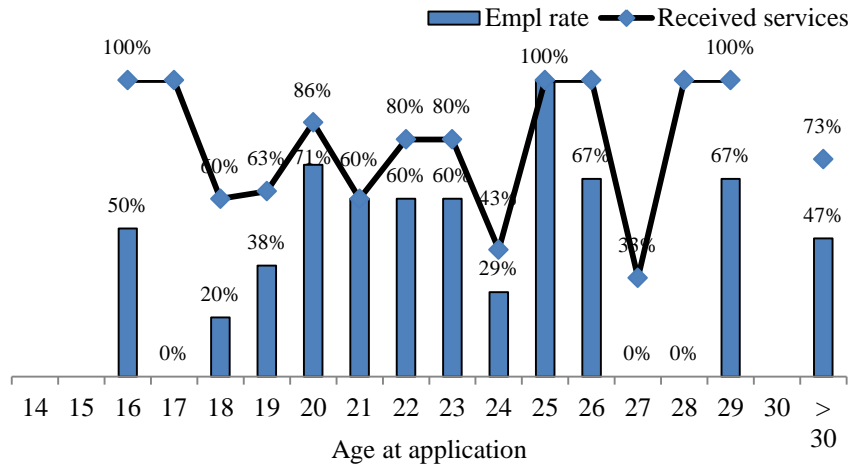

Figure 5. What percentage of youth reported special education or a completion/attendance certificate at closure?
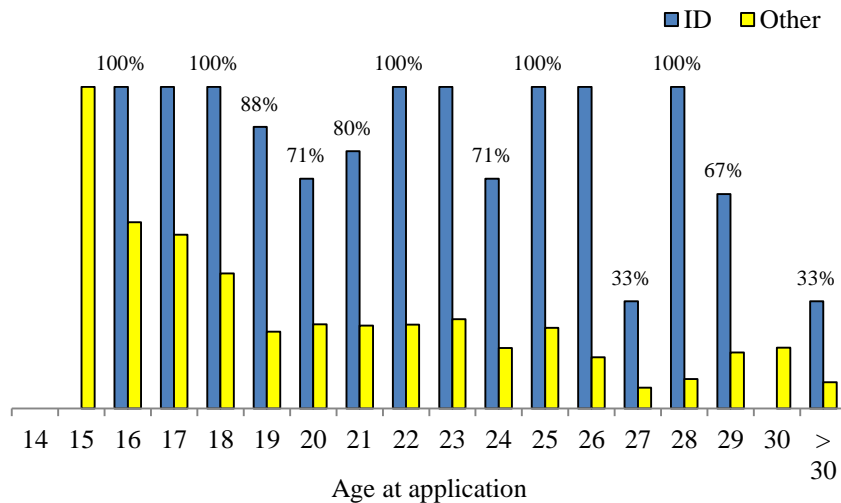

Figure 6. What was the cost of purchased services for closures in integrated employment?
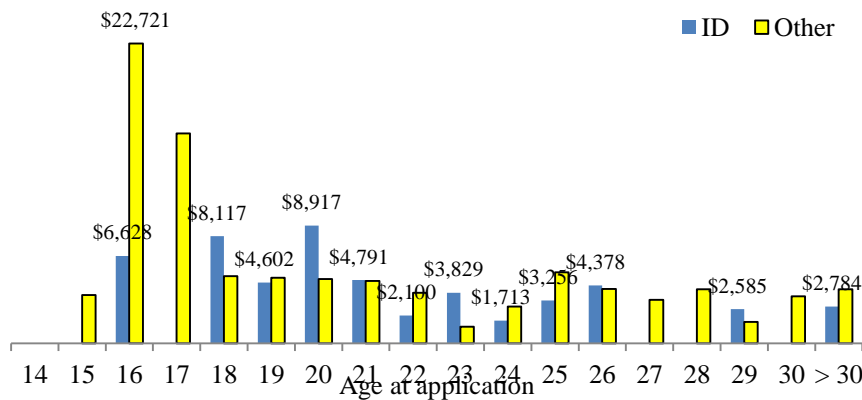

partnerships
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3

Figure 7. How many years did it take from application to a closure into integrated employment?
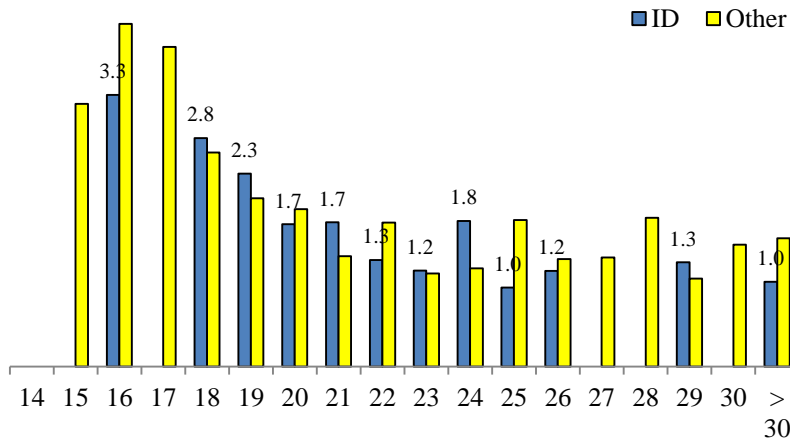

Figure 8. What age did youth have when they exited VR with jobs in integrated employment?
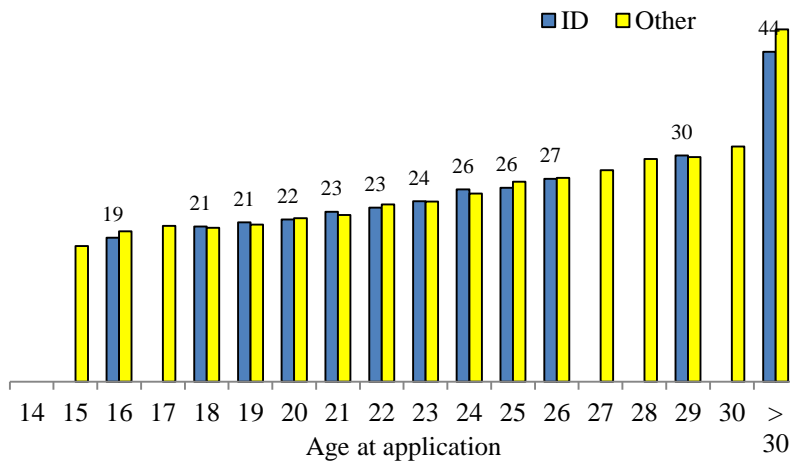

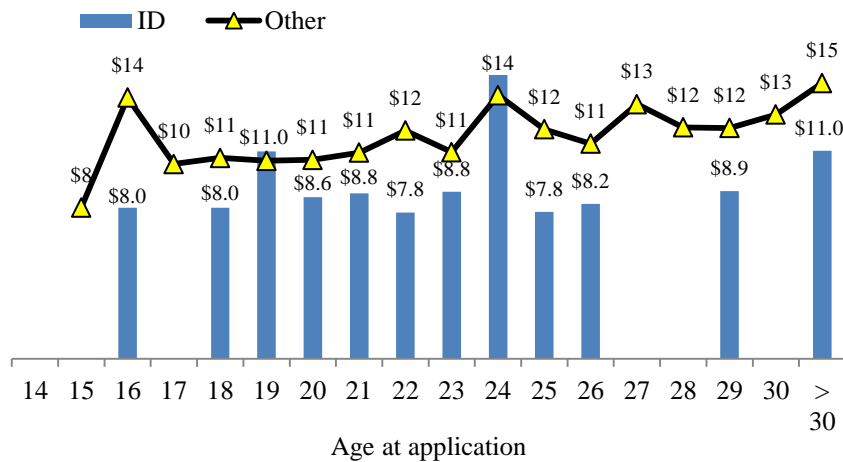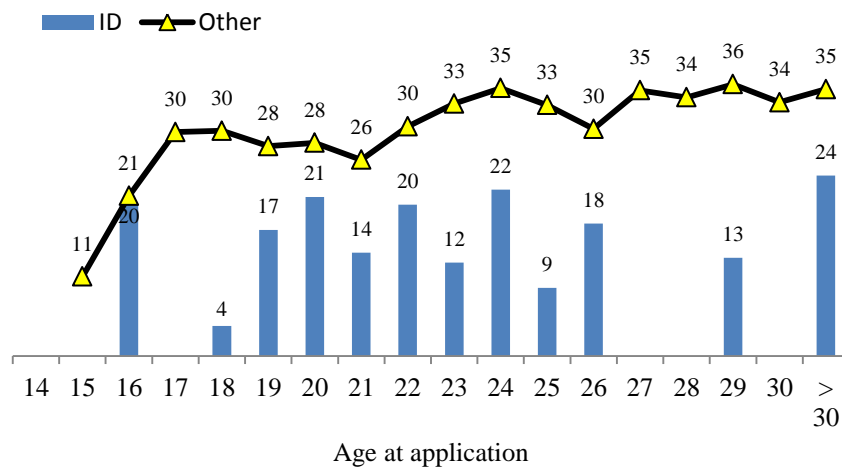**Figure 9. What were the hourly earnings of youth who gained employment?**

4

Figure 10. What were the weekly work hours of youth who gained employment?

Age at application

Overall, people with ID 30 years of age or younger at application represented about 79% of the total number of people with ID. The corresponding figure for people with other types of disabilities was 33%.

	Percentage		Number	
	ID	Other	ID	Other
30 or younger	79%	33%	57	576
Older than 30	21%	67%	15	1,150
Total	100%	100%	72	1,726

Prepared by Alberto Migliore
March, 2014

Partnerships in Employment Systems Change Technical Assistance Center
Institute for Community Inclusion
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partnerships
in employment

Fast Facts: Youth who exited the VR program by age at application. National

Data source: RSA911, FY2012, National
Target population: People with intellectual disabilities (ID) vs. people with other disabilities. A person with ID is someone for whom code 25 (mental retardation in the RSA-911 dataset) was reported as the cause of either a primary or secondary impairment to employment.
Age group: 14-30
Employment: Employment is defined as full-time or part-time employment in an integrated setting with or without ongoing support services.

Table of content

Figure 1. How many youth with ID exited the VR program, by age at application?

Age at application

Values by age: < 14: 6; 14: 95; 15: 586; 16: 2,030; 17: 4,145; 18: 6,400; 19: 3,933; 20: 3,212; 21: 2,760; 22: 1,836; 23: 1,521; 24: 1,290; 25: 1,170; 26: 1,067; 27: 950; 28: 894; 29: 866; 30: 754

Figure 2. How many youth with other disabilities exited the VR program, by age at application?

Age at application

Values by age: < 14: 158; 14: 400; 15: 1,830; 16: 9,166; 17: 29,701; 18: 42,356; 19: 20,125; 20: 12,805; 21: 10,895; 22: 9,713; 23: 8,751; 26: 8,487; 28: 8,371; 30: 8,383

Figure 3. What percentage of youth received VR services?

ID   Other

Age at application

ID values: 14: 72%; 15: 81%; 16: 76%; 17: 70%; 18: 62%; 19: 59%; 20: 63%; 21: 61%; 22: 64%; 23: 66%; 24: 62%; 25: 64%; 26: 63%; 27: 66%; 28: 66%; 29: 64%; 30: 65%; > 30: 67%

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2

Figure 4. What percentage of youth gained integrated employment, compared to the percentage of youth who received services? Youth with ID only.

Figure 5. What percentage of youth reported special education or a completion/attendance certificate at closure?

Figure 6. What was the cost of purchased services for closures in integrated employment?

3

Figure 7. How many years did it take from application to a closure into integrated employment?

Figure 8. What age did youth have when they exited VR with jobs in integrated employment?

Figure 9. What were the hourly earnings of youth who gained employment?

Figure 10. What were the weekly work hours of youth who gained employment?

Overall, people with ID 30 years of age or younger at application represented about 72% of the total number of people with ID. The corresponding figure for people with other types of disabilities was 45%.

	Percentage		Number	
	ID	Other	ID	Other
30 or younger	72%	45%	33,515	239,148
Older than 30	28%	55%	13,157	291,852
Total	100%	100%	46,672	531,000

Prepared by Alberto Migliore
March, 2014

Partnerships in Employment Systems Change Technical Assistance Center
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DATA IN PREPARATION FOR THE SITE VISIT TO ALASKA, MARCH 2014

Data source: RSA911, FY2005-12, Alaska and the nation
Target population: Intellectual disabilities, substance abuse, and mental health disabilities
    Intellectual disability = primary or secondary majorcause = 25 (mental retardation)
    Substance abuse= majordis 1802 (Alcohol Abuse or Dependence) or 1818 (Drug Abuse or Dependence (other than alcohol)
    Mental health = Psychosocial Impairments (interpersonal and behavioral impairments, difficulty coping) caused by majordis 1804 (Anxiety Disorders), 1815 (Depressive and other Mood Disorders), 1824 (Mental Illness (not listed elsewhere), 1829 (Personality Disorders), or 1833 (Schizophrenia and other Psychotic Disorders.
Age group: 16-30
Employment: status 26
Data from spreadsheet "AK youth RSA911 031814.xls" in C:\Alberto 14\ICI 14\Projects\13 - 18 ADD\ADD Suppl 14

ALASKA
Table 3. Employment Outcomes, Vocational Rehabilitation Closures, Age 16-21 (RSA-911)

	2005	2006	2007	2008	2009	2010	2011	2012
Total number of closures								
All disabilities	230	252	242	227	232	248	255	271
Intellectual disability	30	27	29	30	29	22	24	29
Substance abuse	1	7	3	7	4	5	7	5
Mental health	25	16	25	14	13	28	22	31
Percentage of closures								
Intellectual disability	13%	11%	12%	13%	13%	9%	9%	11%
Substance abuse	0%	3%	1%	3%	2%	2%	3%	2%
Mental health	11%	6%	10%	6%	6%	11%	9%	11%
Rehabilitation rate								
All disabilities	65%	57%	55%	57%	51%	64%	60%	63%
Intellectual disability	76%	55%	79%	56%	58%	71%	55%	62%
Substance abuse	0%	3%	0%	5%	2%	3%	1%	0%
Mental health	14%	10%	4%	7%	4%	11%	11%	11%
Percentage employed of the total								
All disabilities	37%	31%	35%	33%	30%	33%	32%	35%
Intellectual disability	43%	41%	66%	33%	38%	55%	25%	45%
Substance abuse	0%	29%	0%	43%	25%	40%	14%	0%
Mental health	40%	38%	12%	29%	15%	25%	36%	26%
Mean weekly earnings in 2012 dollars								
All disabilities	$401	$350	$380	$413	$344	$325	$345	$293
Intellectual disability	$252	$172	$158	$174	$227	$155	$157	$158
Substance abuse	$0	$447	$0	$535	$343	$376	$368	$0
Mental health	$325	$231	$247	$388	$412	$263	$332	$285
Mean weekly hours worked								
All disabilities	31	28	28	32	29	27	29	26
Intellectual disability	21	18	16	19	24	16	19	17
Substance abuse	0	38	0	33	40	35	40	0
Mental health	31	23	24	30	30	26	28	28

ALASKA

Table 4. Employment Outcomes, Vocational Rehabilitation Closures, Age 22-30 (RSA-911)

	2005	2006	2007	2008	2009	2010	2011	2012
Total number of closures								
All disabilities	266	292	246	248	298	315	357	368
Intellectual disability	22	29	16	26	12	19	22	28
Substance abuse	20	23	22	25	48	55	71	80
Mental health	28	36	29	34	42	42	48	44
Percentage of closures								
Intellectual disability	8%	10%	7%	10%	4%	6%	6%	8%
Substance abuse	8%	8%	9%	10%	16%	17%	20%	22%
Mental health	11%	12%	12%	14%	14%	13%	13%	12%
Rehabilitation rate								
All disabilities	68%	56%	63%	74%	60%	58%	66%	70%
Intellectual disability	89%	60%	60%	82%	63%	64%	83%	65%
Substance abuse	4%	5%	11%	12%	16%	21%	27%	37%
Mental health	8%	6%	11%	16%	22%	16%	19%	15%
Percentage employed of the total								
All disabilities	39%	27%	36%	42%	29%	26%	33%	38%
Intellectual disability	73%	52%	38%	54%	42%	47%	68%	46%
Substance abuse	15%	13%	36%	36%	23%	22%	30%	44%
Mental health	25%	11%	28%	35%	33%	21%	31%	30%
Mean weekly earnings in 2012 dollars								
All disabilities	$486	$401	$454	$448	$413	$441	$438	$403
Intellectual disability	$197	$190	$144	$187	$96	$180	$141	$180
Substance abuse	$588	$513	$646	$666	$516	$562	$526	$519
Mental health	$494	$355	$452	$537	$389	$457	$462	$442
Mean weekly hours worked								
All disabilities	33	30	31	32	30	32	32	32
Intellectual disability	19	19	15	19	12	20	15	16
Substance abuse	30	39	38	38	36	41	38	39
Mental health	36	27	31	34	30	33	31	32

NATIONAL

Table 3. Employment Outcomes, Vocational Rehabilitation Closures, Age 16-21 (RSA-911)

	2005	2006	2007	2008	2009	2010	2011	2012
Total number of closures								
All disabilities	150,271	153,587	151,840	159,901	153,034	163,791	159,278	156,912
Intellectual disability	26,776	27,463	26,108	26,408	24,145	24,437	22,907	22,480
Substance abuse	1,282	1,260	1,407	1,449	1,519	1,536	1,164	1,111
Mental health	13,693	13,823	14,142	14,954	15,141	17,005	16,890	16,673
Percentage of closures								
Intellectual disability	18%	18%	17%	17%	16%	15%	14%	14%
Substance abuse	1%	1%	1%	1%	1%	1%	1%	1%
Mental health	9%	9%	9%	9%	10%	10%	11%	11%
Rehabilitation rate								
All disabilities	56%	57%	57%	55%	53%	48%	51%	53%
Intellectual disability	53%	53%	55%	53%	50%	45%	48%	49%
Substance abuse	1%	1%	1%	1%	1%	1%	1%	1%
Mental health	9%	9%	9%	9%	9%	10%	10%	10%
Percentage employed of the total								
All disabilities	33%	33%	33%	32%	30%	27%	29%	31%
Intellectual disability	37%	37%	37%	36%	32%	29%	30%	31%
Substance abuse	28%	28%	32%	28%	26%	22%	26%	24%
Mental health	27%	27%	27%	26%	23%	21%	24%	24%
Mean weekly earnings in 2012 dollars								
All disabilities	$335	$335	$336	$331	$325	$314	$303	$300
Intellectual disability	$217	$214	$217	$213	$209	$210	$206	$205
Substance abuse	$372	$362	$372	$383	$359	$353	$340	$319
Mental health	$342	$337	$335	$326	$319	$315	$298	$296
Mean weekly hours worked								
All disabilities	32	32	32	32	30	30	30	30
Intellectual disability	27	27	27	26	25	24	24	24
Substance abuse	37	37	37	37	35	34	35	33
Mental health	33	32	32	32	31	30	30	30

Table 4. Employment Outcomes, Vocational Rehabilitation Closures, Age 22-30 (RSA-911)

	2005	2006	2007	2008	2009	2010	2011	2012
Total number of closures								
All disabilities	99,600	99,584	96,071	98,294	95,680	101,768	97,792	96,695
Intellectual disability	11,517	11,374	10,896	11,160	10,259	10,520	10,633	10,348
Substance abuse	4,032	4,463	4,808	5,437	5,658	6,095	5,156	5,082
Mental health	18,508	18,906	18,852	19,621	20,625	22,928	22,456	22,206
Percentage of closures								
Intellectual disability	12%	11%	11%	11%	11%	10%	11%	11%
Substance abuse	4%	4%	5%	6%	6%	6%	5%	5%
Mental health	19%	19%	20%	20%	22%	23%	23%	23%
Rehabilitation rate								
All disabilities	57%	57%	58%	56%	54%	51%	53%	55%
Intellectual disability	58%	59%	60%	59%	57%	52%	54%	57%
Substance abuse	6%	7%	8%	9%	10%	9%	8%	8%
Mental health	21%	21%	21%	22%	23%	23%	24%	25%
Percentage employed of the total								
All disabilities	31%	31%	32%	31%	28%	26%	28%	29%
Intellectual disability	41%	42%	42%	41%	37%	34%	35%	36%
Substance abuse	33%	34%	35%	34%	30%	26%	29%	28%
Mental health	28%	27%	28%	27%	25%	23%	25%	26%
Mean weekly earnings in 2012 dollars								
All disabilities	$359	$361	$363	$356	$356	$348	$342	$334
Intellectual disability	$194	$197	$193	$188	$192	$196	$194	$190
Substance abuse	$408	$407	$419	$407	$402	$401	$393	$401
Mental health	$347	$357	$353	$349	$344	$334	$334	$323
Mean weekly hours worked								
All disabilities	32	32	32	32	31	31	31	31
Intellectual disability	24	25	24	23	23	23	23	23
Substance abuse	38	38	38	38	36	36	36	36
Mental health	32	32	32	32	31	31	31	31

Fast Facts: Youth who exited the state VR program, by age at application. Alaska

Data source: RSA911, FY2012, Alaska
Target population: Intellectual disabilities (ID) = primary or secondary majorcause = 25 (mental retardation)
Age group: 14-30
Employment: Employment is in an integrated setting with or without ongoing support services (clsrwork 1 or 7).
Data from file "Age differences states 030614.xls, tab 'TablesAKid' at C:\Alberto 14\ICI 14\Projects\Transition 12\Data Note\DataNote3

Overall, people with ID who were 30 years of age or younger at application represented about 79% of the total number of people with ID who exited VR in 2012. The corresponding figure for people with other types of disabilities was 33%.

	Percentage		Number	
	ID	Other	ID	Other
30 or younger	79%	33%	57	576
Older than 30	21%	67%	15	1,150
Total	100%	100%	72	1,726

5

Figure 1. How many youth with ID exited the VR program, by age at application?
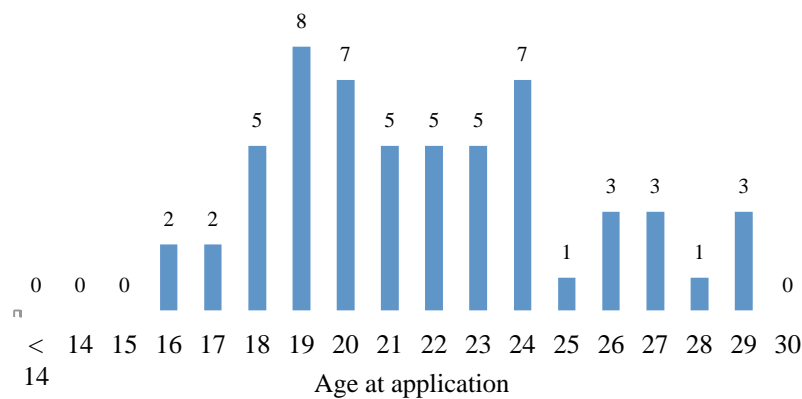

Figure 2. How many youth with other disabilities exited the VR program, by age at application?
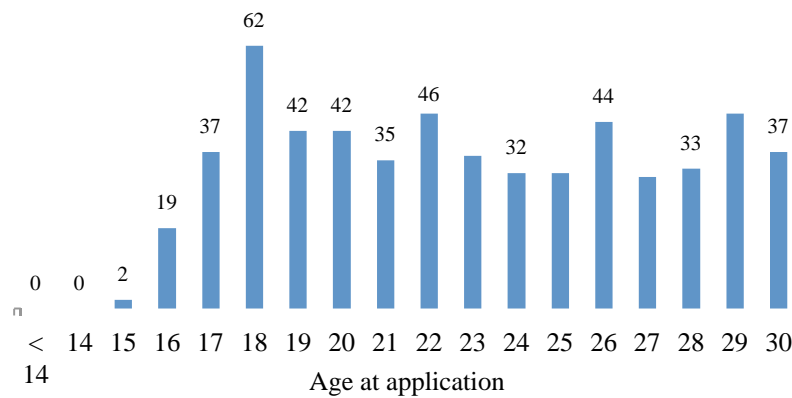

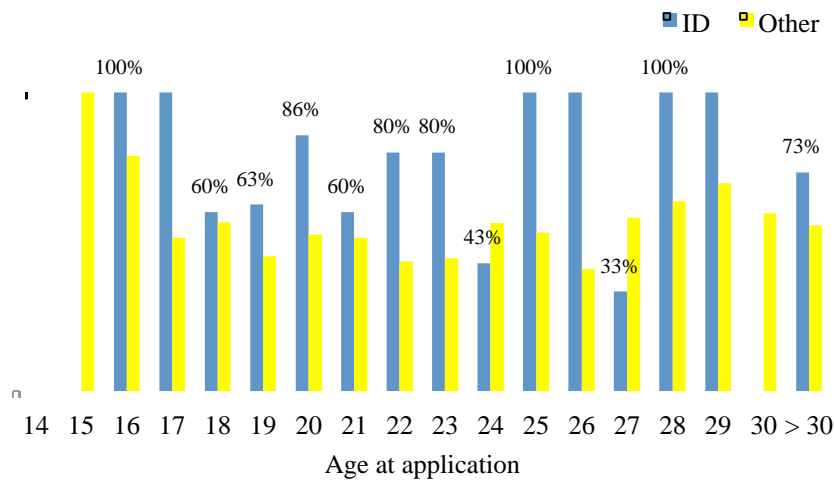**Figure 3. What percentage of youth received VR services?**

Figure 4. What percentage of youth gained integrated employment, compared to the percentage of youth who received services? Youth with ID only.

Figure 5. What percentage of youth reported special education or a completion/attendance certificate at closure?

Figure 6. What was the cost of purchased services for closures in integrated employment?

Age at application

Figure 7. How many years did it take from application to a closure into integrated employment?

Figure 8. What age did youth have when they exited VR with jobs in integrated employment?

Age at application

Figure 9. What were the hourly earnings of youth who gained integrated employment?

Figure 10. What were the weekly work hours of youth who gained integrated employment?

9

Fast Facts: Youth who exited the state VR program, by age at application. Alaska

Data source: RSA911, FY2012, Alaska
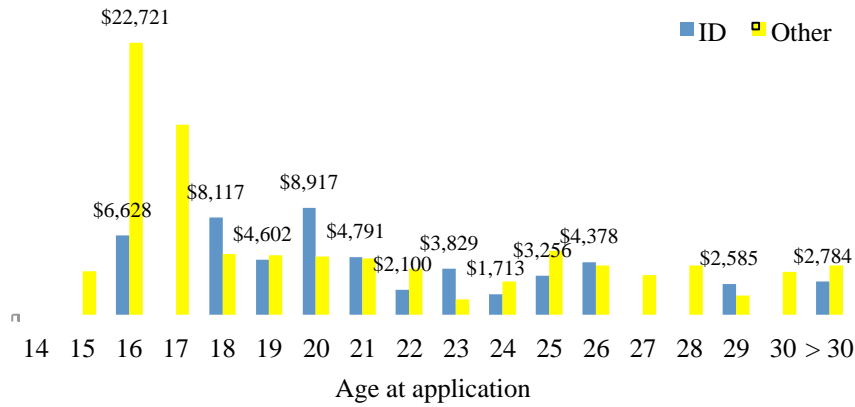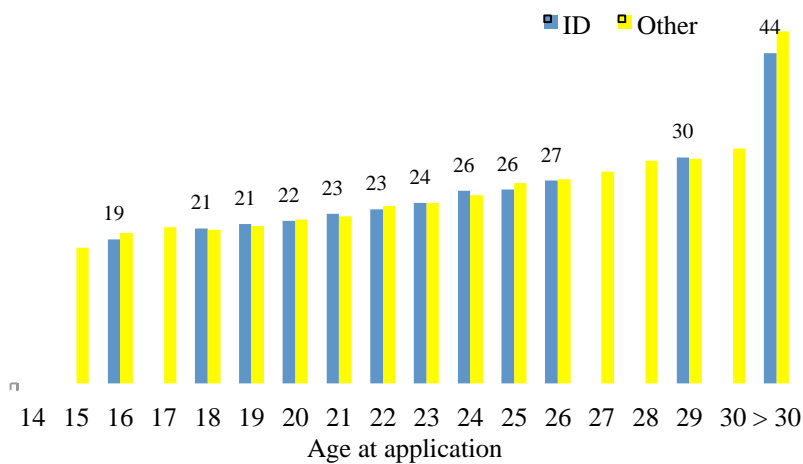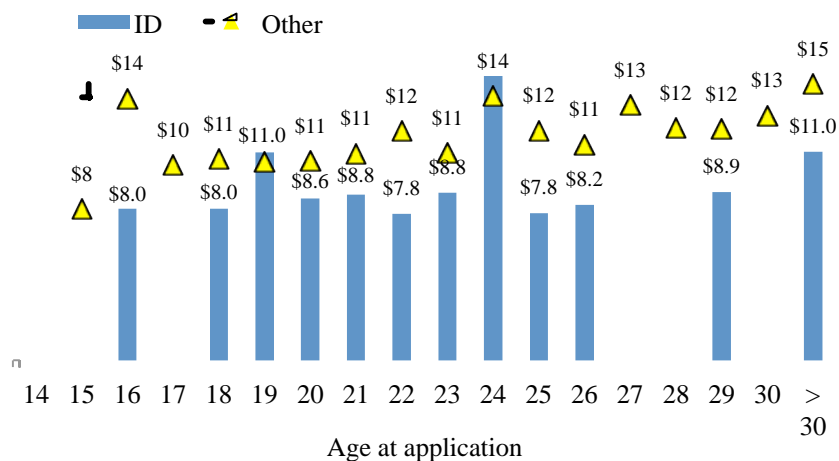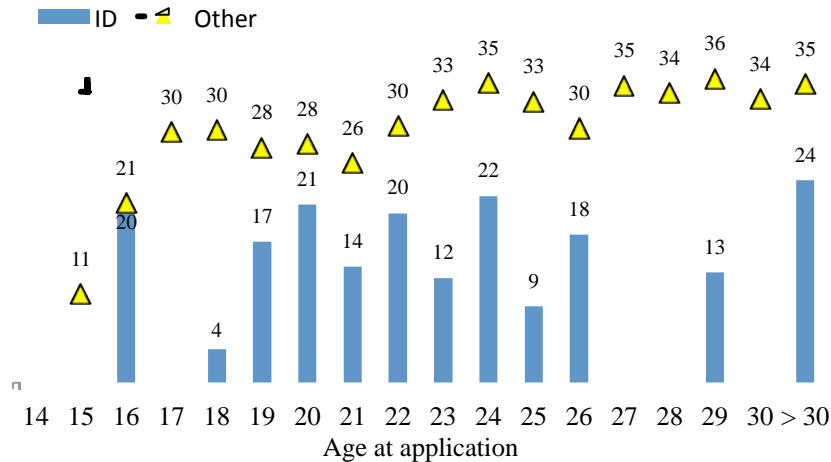**Target population:** Substance abuse and mental health disabilities
  Substance abuse= majordis 1802 (Alcohol Abuse or Dependence) or 1818 (Drug Abuse or Dependence (other than alcohol)
  Mental health = Psychosocial Impairments (interpersonal and behavioral impairments, difficulty coping) caused by majordis 1804 (Anxiety Disorders), 1815 (Depressive and other Mood Disorders), 1824 (Mental Illness (not listed elsewhere), 1829 (Personality Disorders), or 1833 (Schizophrenia and other Psychotic Disorders.
Age group: 14-30
Employment: Employment is in an integrated setting with or without ongoing support services (clsrwork 1 or 7).
Data from file "Age differences states 030614.xls, tab 'TablesAKmh' at C:\Alberto 14\ICI 14\Projects\Transition 12\Data Note\DataNote3

Overall, people with substance abuse who were 30 years of age or younger at application represented about 34% of the total number of people with substance abuse who exited VR in 2012. The corresponding figure for people with MH disabilities was 27%.

	Percentage		Number	
	Sub Abuse	MH	Sub Abuse	MH
30 or younger	34%	27%	75	85
Older than 30	66%	73%	145	231
Total	100%	100%	220	316

Figure 11. How many youth with <u>sub abuse</u> exited the VR program, by age at application?
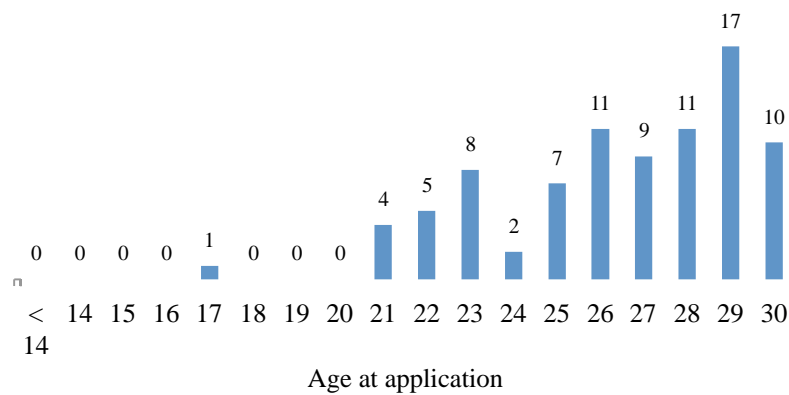
Age at application

Figure 12. How many youth with <u>mental health</u> disabilities exited the VR program, by age at application?

Age at application
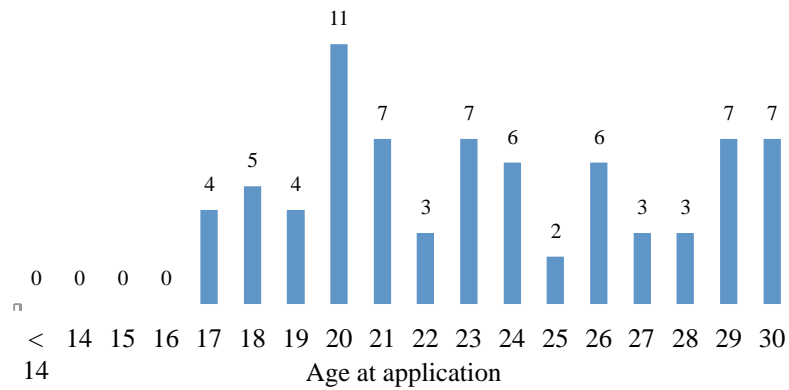
Figure 13. What percentage of youth received VR services?

Age at application

11
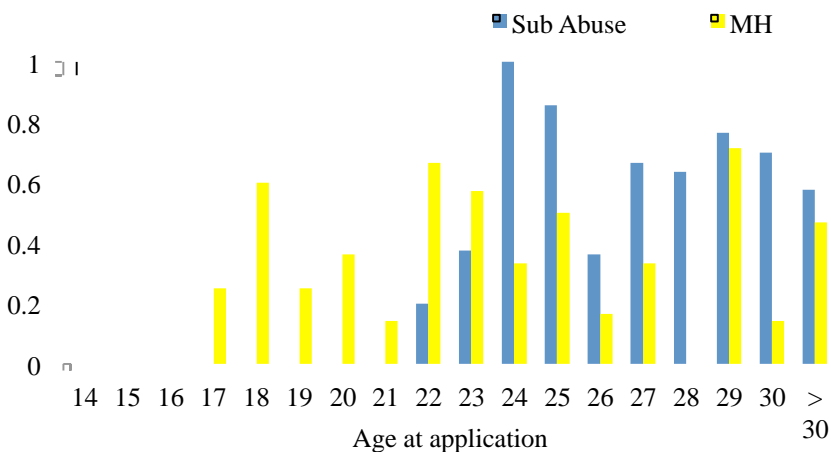
Figure 14. What percentage of youth gained integrated employment, compared to the percentage of youth who received services? Youth with <u>sub abuse</u> only.
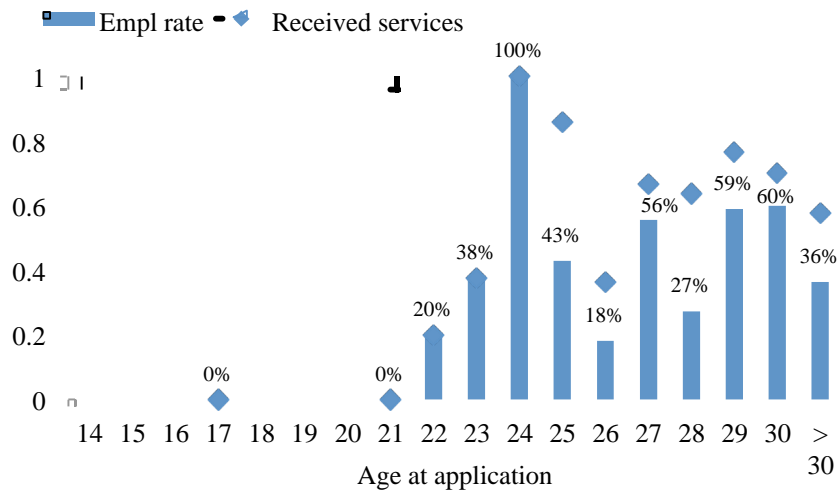
Figure 15bis. What percentage of youth gained integrated employment, compared to the percentage of youth who received services? Youth with <u>MH disabilities</u> only.
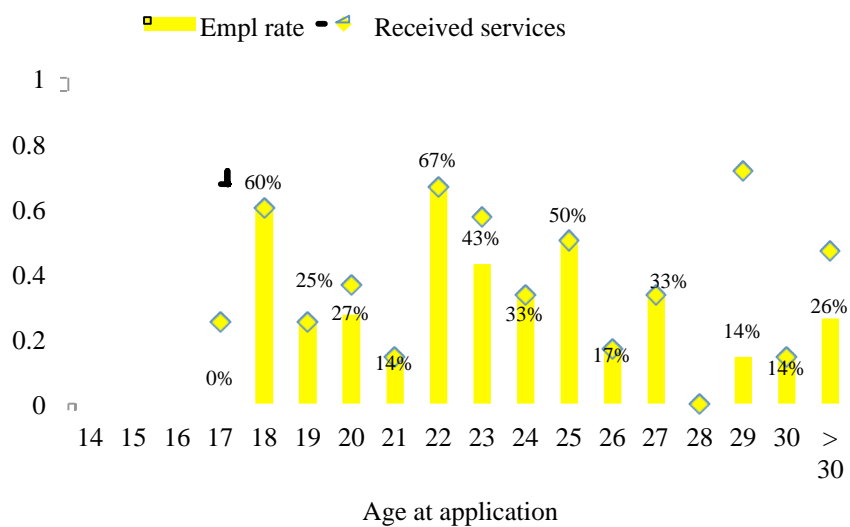
Figure 16. What percentage of youth reported special education or a completion/attendance certificate at closure?

12
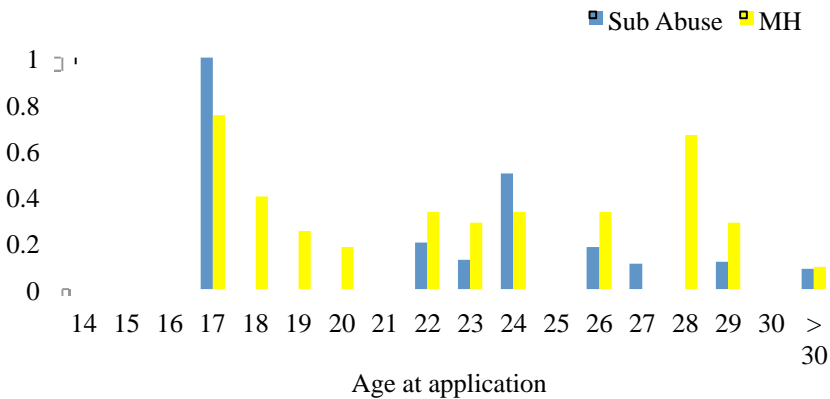
Figure 17. What was the cost of purchased services for closures in integrated employment?
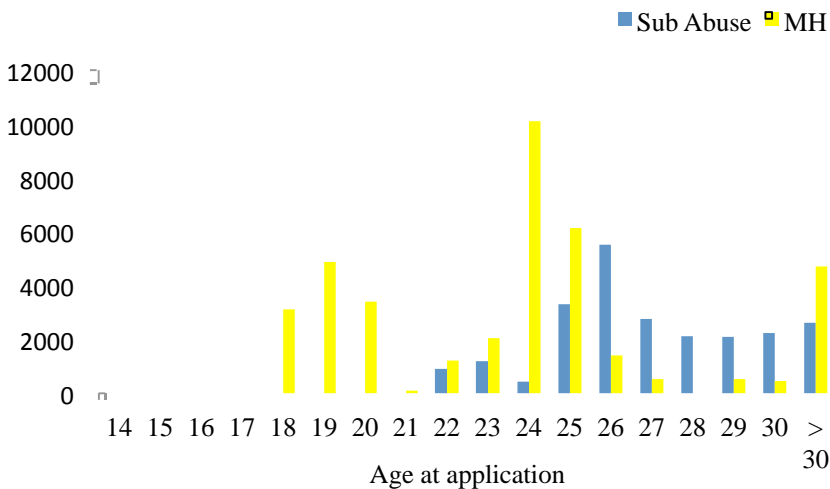
Figure 18. How many years did it take from application to a closure into integrated employment?
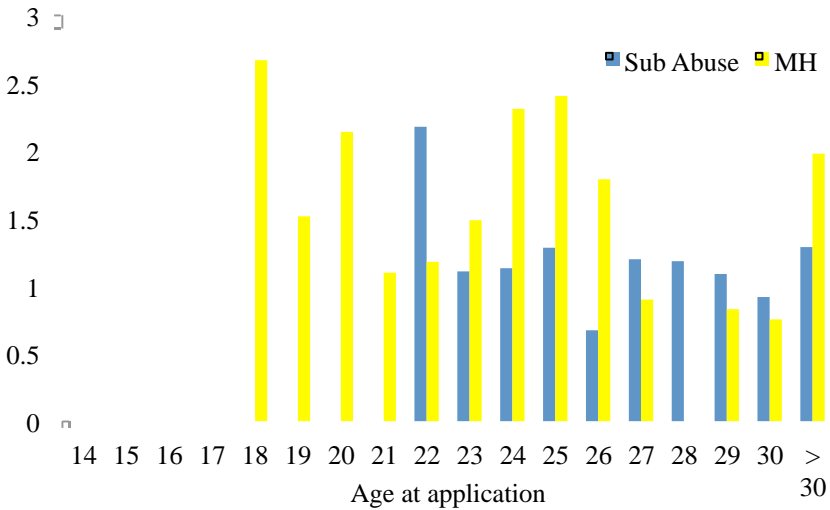
Figure 19. What age did youth have when they exited VR with jobs in integrated employment?

13
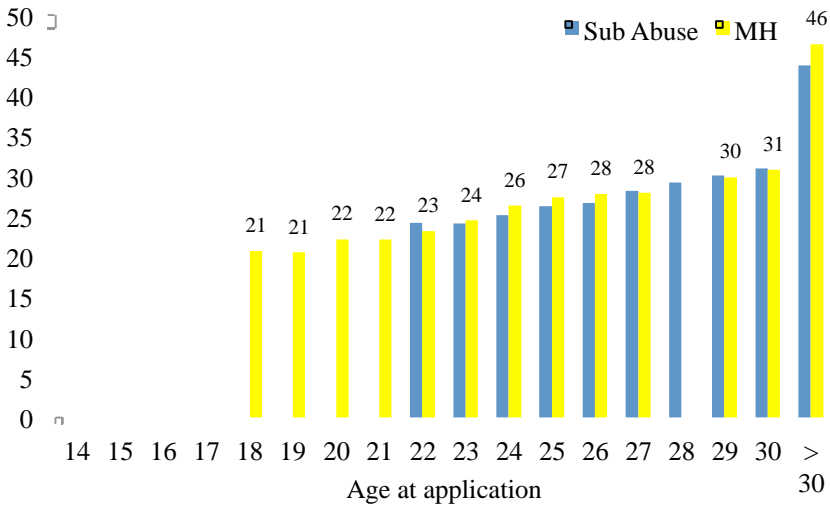
Figure 20. What were the hourly earnings of youth who gained integrated employment?
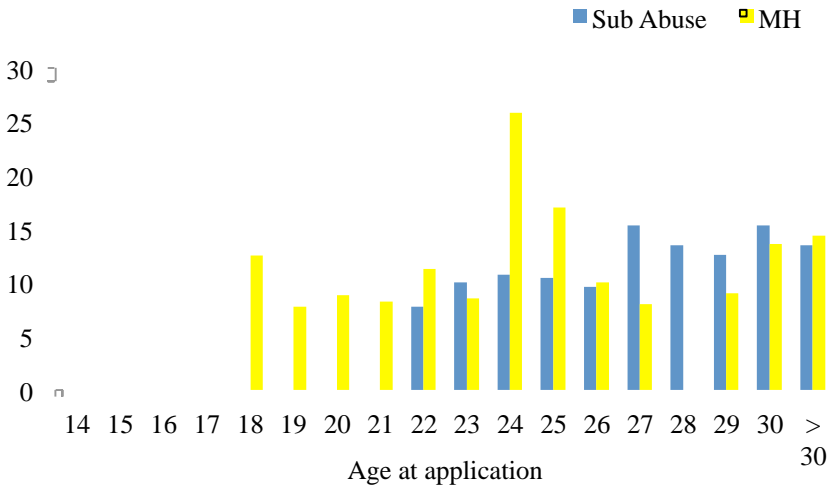
Figure 21. What were the weekly work hours of youth who gained integrated employment?

14
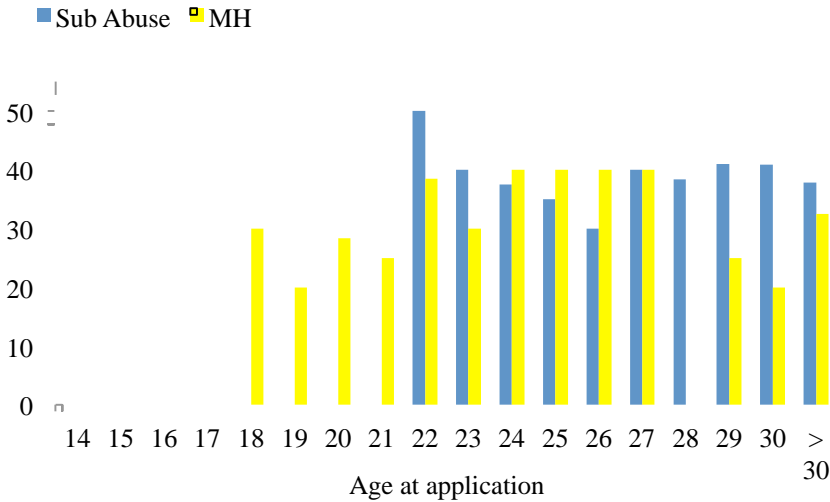
APPENDIX E

TO:	Alaska VR Staff and Providers; Alaska DBH Staff and Providers
FROM:	Cheryl Walsh, DVR Director; Melissa Stone, DBH Director
SUBJECT:	Joint Efforts to Promote Recovery and Employment Outcomes

The Alaska Divisions of Vocational Rehabilitation and Behavioral Health are currently involved in a variety of efforts to produce better outcomes in terms of Recovery and specifically employment and economic engagement for mutual customers of both agencies with psychiatric disabilities. We are currently reviewing our administrative structures, policies, program design, and service delivery to identify barriers to this goal and develop both individual and collaborative solutions to surmount them. While there is much concrete still to be done, we both felt it imperative that we state to our respective staffs and providers the values that drive this work we are undertaking. So below is a joint statement of mutual beliefs and intent of each of our agencies. Both of us also recognize the current financial and system challenges facing us in putting this lofty goal statement into practice. However, we feel it is nonetheless imperative that the actions and changes that follow should proceed from this overall set of values and broad statement of goals. While not all of this can be accomplished as swiftly as we would like, we still believe that moving our systems what we espouse below is essential. Both of us commit to making our agencies work consistently to forward this agenda and we look forward to hearing your ideas on how to make this a reality within the various pressures that we all face. Thus:

We believe that recovery is possible for individuals with mental illness and that employment is a major element in this process. Our collaboration and partnership is based upon the belief that the best use of federal and state monies is on programs and services that produce the outcomes needed to enable citizens with psychiatric disabilities to succeed personally and economically through effective and efficient service delivery. Assisting people with psychiatric disabilities to enter employment is integral to the overall mission of both Alaska DBH and DVR and thus inherent in the responsibilities of its entire staff and providers, even those not explicitly charged with work service responsibility. This means that employment is an expected outcome for the total mental health system of care, not just employment programs or those involved with public VR.

Both of our agencies hold a conviction that all people (including persons with psychiatric disabilities) should be employed, have the citizenship right to equal access to employment, and will be assisted to do so because employment is a way for people to become economically self-sufficient, healthier, and fulfilled. Work is not just an opportunity to be offered people to "take or leave" as they prefer; rather, it is a responsibility of citizenship.

We hereby commit to the citizens of Alaska that high quality employment and support services for individuals with mental illness are high priorities for both our agencies; that service delivery will be consistent with the best evidence available and even then subject to quality improvement; and that ongoing examination of our policy and procedures through internal self-analysis and openness to external criticism will occur to support comprehensive multi-system transformation.

Suggested Statement re Employment for Contractors and Suppliers Who Do Business with the AMHTA

The AMHTA is committed to enhancing employment outcomes for Alaskan Trust beneficiaries as a priority funding and service area. In support of this goal, the AMHTA has a policy of expecting contractors and suppliers with which it does business to actively recruit, hire, promote, and retain qualified applicants and current employees who are one of the Trust beneficiary groups. Periodically we will reach out to our contractors and suppliers and ask them to formally identify how they are achieving this goal. Furthermore, the AMHTA would expect that all the programs which are recipients of its grant funds to develop a similar policy with their own network of contractors and suppliers.

Appendix F

**Suggested Statement re Employment for Contractors and Suppliers
Who Do Business with the AMHTA**

The AMHTA is committed to enhancing employment outcomes for Alaskan Trust beneficiaries as a priority funding and service area. In support of this goal, the AMHTA has a policy of expecting contractors and suppliers with which it does business to actively recruit, hire, promote, and retain qualified applicants and current employees who are one of the Trust beneficiary groups. Periodically we will reach out to our contractors and suppliers and ask them to formally identify how they are achieving this goal. Furthermore, the AMHTA would expect that all the programs which are recipients of its grant funds to develop a similar policy with their own network of contractors and suppliers.

Appendix G

**Missouri Department of Mental Health, Appropriate Use of Community Support and
Targeted Case Management in Workplace Environments**

Appropriate Use of Community Support and Targeted Case Management in Workplace Environments

Missouri Department of Mental Health
Office of Mental Health Transformation

This document is designed to provide guidance on billing for elements of supported employment under the Rehabilitation and Targeted Case Management Options of Medicaid for people with serious mental illness. It is intended to assist workers in providing assistance and identifying billable activities related to supported employment.

**MISSOURI
Mental Health
TRANSFORMATION
Creating Communities of Hope**

www.motransformation.com

Medicaid is a program designed to fund medical services. Demonstrating the "medical necessity" of services is an administrative requirement attached to the development and documentation of an individual plan. The treatment plan should clearly demonstrate the legitimate clinical need, the justification for services provided, and indicate an appropriate response to that need. The clearest and most effective approach in documenting medical necessity is through the creation of a clinically relevant individual plan. Effective development and documentation of holistic individual plans is both an acquired skill as well as a clinical art.

The treatment plan:
- Helps to integrate information about the person and family as related to clinical needs;
- Facilitates prioritization of needs, interests, and recovery/rehabilitative goals;
- Provides a strategy for managing complexity and describes interventions defined by measurable outcomes;
- Is an ongoing process connecting clinical assessments with targeted service delivery.

Progress notes should clearly state activities and interventions that are directly related to the goals and interventions described in the treatment plan.

Medicaid Will Not Pay For:

In general, Medicaid will not pay for:
1. job skill training & coaching for specific job skills and job tasks (do not bill for teaching the job functions, i.e., how to work the computer, fryer, phone system, drill press, etc.)
2. tuition for training programs
3. supplies for work (boots, computers, uniforms, etc.)
4. speeches to Rotary and other community groups seeking employer engagement
5. "Cold calls" to employers for generic job leads

Community Support and Targeted Case Management in the Work Environment

The vast majority of community psychiatric rehabilitation (CPR) program activities in a workplace environment focus on helping a person overcome or address psychiatric symptoms that interfere with seeking, obtaining, and maintaining a job. Symptoms include both positive and negative symptoms. Positive symptoms include auditory or visual hallucinations, incoherence or marked loosening of associations, delusions, etc. Negative symptoms include apathy, lethargy (lack of motivation), ambivalence, flattening of emotions, isolation, and withdrawal. It is likely that the reason you are providing the CPR help is due to these symptoms. Medicaid will reimburse for supports that relate to any of these symptoms. The service being provided is focused on illness management and recovery, regardless of setting.

Treatment plans should address a person's interest or desire to work or pursue a career. Documentation (action plans, progress notes, etc.) should refer to the person's diagnosis, employment goals, and why they need assistance due to psychiatric symptoms interfering with achieving employment goals.

Here are a few examples of Community Support Interventions in the Workplace Environment (in bold print):

Example #1

A person you are working with says he would like to work. He reports having the desire to work, but struggles with feeling depressed, isolated, is uncomfortable in crowds, lacks motivation to get out of bed, sleeps much of the day, and is unfamiliar with employment options. This person has many strengths, including an awareness of his symptoms, good personal hygiene and grooming habits, and has worked sporadically in the past. Following a discussion with him and the treatment team, the treatment plan is revised to include an employment goal. Since it's been a while since his last job, he has expressed interest in working on communication skills and self-presentation so **the plan includes interventions such as role playing and practicing skills in a community setting. You also work with the person**

to establish a routine, including a sleep schedule. You assist the individual with exploring local employment options, including discussions about interest, monitoring or assisting with finding job openings in the local paper, reviewing employment assistance resources (VR, career centers, employment services, Internet, newspaper, etc.), going with him out in the community (if needed) to look at employment options, and researching and assisting with transportation options.

Example #2

The person you are working with begins hearing voices on the job, walks off the job site, and calls to tell you he does not want to work. **You discuss with him that there are ways to manage increased symptoms at work, and you are willing to coordinate with his psychiarist and/or licensed Mental Health Clinician to develop a plan that would include ways to deal with symptoms on the job site. You spend time with him planning and practicing which strategies to try when symptoms occur at work. You meet with him and his supervisor to discuss any reasonable accommodations that need to be made, discuss recent problems at work, and develop a plan. You touch base with him and his supervisor several times over the next few days to see if the plan is working.**

Example #3

You get a call from a supervisor that a person you work with has been doing poorly at work. She has been getting angry at other employees, calling in sick, and is having difficulty completing the job. The supervisor has previously been very satisfied with her performance. You make a visit to the job site, and **work with her to assess the situation while the supervisor is present. In this interaction you realize that she is experiencing confusion and frustrations due to her delusions. You remind and rehearse with the person how her illness-self-managment group taught her to deal with her delusions by identifying triggers and acceptable coping strategies. You also point out and model alternative strategies with her and the employer using accommodations (quieter work space and rearrangement of duties to have less contact with coworkers) that will minimize the effects of her symptoms. You remind her to discuss her symptoms with her psychiatrist and/or licensed Mental Health Clinician.**

Example #4

A person that you work with starts a new job, and calls to say that people at work are staring at her and talking about her. You make a visit to the job site and realize that the person is having difficulty interacting with other employees due to her inability to manage anxiety, panic, and fear. **You work with the person in identifying strategies to manage her anxiety, panic, and fear by helping her use breathing techniques to decrease her anxiety, based upon the interventions prescribed by her psychiatrist and/or licensed Mental Health Clinician.**

Example #5

A man you are working with has a desire to be employed, and is interested in retail sales. He comes from a family of jewelers and wants to have a similar job. **Unfortunately, his rapid cycling manic symptoms can be unpredictable, thus he is not always appropriate with customers (too talkative, silly jokes, does not get down to business). The individual wants to find out what type of duties and tasks are included in becoming a jeweler. In the discussion, you and he come to agreement that due to his symptoms, he is likely to be more successful working in back on jewelry than at the front counter with customers. You and the client explore the local options in the phone book and newspaper. Together, you make calls to inquire about the type of duties required and visit a few jewelry stores to explore work environments. You and the client approach XYZ jewelers, and discuss duties that are needed by them. You assist during the visit with prompts to ask questions about the essential functions of the job, and assist him with remaining focused. Following the visit, you discuss the duties required and work with him on communication skills, self-presentation, and coping with stress.**

Here are examples of <u>Targeted Case Management</u> Interventions (TCM) (in bold print):

<u>Example #6</u>

Your agency wants to improve the employment outcomes for the people they serve. With this in mind, you talk with someone in your caseload who has a marked increase in anxiety symptoms due to a fear of losing her benefits if she goes back to work. You talk with her about this and tell her about the agency's benefits specialist or Office of Adult Learning and Rehabilitation-VR (VR) office. **She agrees to go with you to a meeting with the benefits specialist (or VR office) to review how employment would affect her benefits.**

<u>Example #7</u>

One of the people you work with who receives TCM services tells you that she is finally ready to try to find a job. You call one of your agency's employment specialists and find out she is not enrolled in VR services. The employment specialist tells you she meets the eligibility requirements for Individual Placement and Support (IPS) supported employment and gives you the contact information for services at the regional VR office. **The treatment plan is revised with the person's input to include an employment goal. You meet with her, provide the contact information, and assist in making the initial phone call.** After talking with her, you determine that additional assistance with coordination and linkage is needed due to symptoms related to her illness, limited natural supports, transportation issues, and advocacy needs. She asks you to accompany her to the initial appointment. **You assist in making the appointment and arrange to meet her at the VR office so you can support her in accessing services.   You investigate resources, provide information, assist with phone calls, and make periodic home or site visits to monitor progress**.

- While transportation can be billable when associated with an intervention, **it is still not allowable to bill for transporting the individual to and from work.**

For questions or concerns regarding this guidance, contact any of the people below:

<div align="center">

Teresa Brandon
573-526-6961
Teresa.brandon@dmh.mo.gov

Tish Thomas
573-751-8076
Tish.thomas@dmh.mo.gov

Virginia Selleck
573-751-8027
Virginia.selleck@dmh.mo.gov

Mickie McDowell
417-895-1332
Mickie.mcdowell@gmail.com

</div>

<div align="center">

Missouri Department of Mental Health
Division of Comprehensive Psychaitric Services
1706 E. Elm St.
Jefferson City, MO 65101
www.dmh.mo.gov

</div>

Appendix H

Epidemiological Research Summary

VISION OF RECOVERY

"Increasing employment for people with mental illness is one of the most urgent priorities in today's mental health system" Mike Hogan

(excerpted from the Ohio Employment Leadership Alliance brochure).

MH SYSTEMS /EMPLOYMENT FIGURES 2011 (SAMHSA)

US ADULT MH

OVERALL = 18%

IN LABOR FORCE (LOOKING FOR WORK OR EMPLOYED) = 35%

ACCESS TO EBP SE = 1.7 %

THOMAS EDISON

" RESULTS!

WHY, I'VE GOTTEN A LOT OF RESULTS.

I KNOW SEVERAL THOUSAND THINGS THAT WON'T WORK. "

Unemployment Rate - USDOL - 8/09

- People without Disabilities – 9.3%

- People with Disabilities - 16.9%

Workforce Participation - USDOL - 8/09

People without Disabilities: 71.2%

People with Disabilities: 22.2%

For people with disabilities, the real issue is workforce participation, not unemployment

POVERTY PSYCH DISABILITY

1. Poverty rate, depth, severity significantly > families w. psych

2. Median /mean total incomes lower; health expenditures higher families w. psych disorder.

3. Odds family is poor 2.90 times > for family w. disorder VS none

4. Most disadvantaged severe poverty families w. psych:
   - Head of family no HS education
   - Head without work entire year
   - Head is Black or Hispanic.
   - Families with non-married heads face greater severity of poverty, as do single persons & single parents.

Vick, B., Jones, K. Mitra, S.(2011).

Poverty and Severe Psychiatric Disorder in the U.S
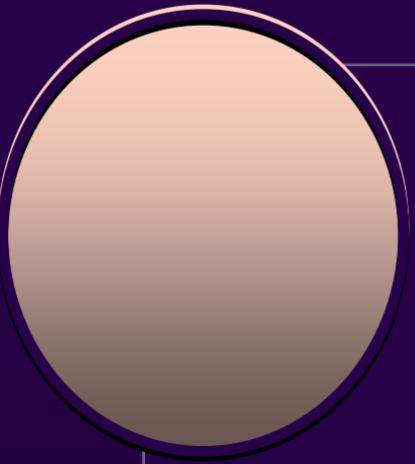
FOR THOSE WHO SAY:

"WHAT ABOUT SPOUSE/ PARENT *ROLE*"

PEOPLE W. MI LESS LIKELY THAN OTHERS TO BE IN SUCH ACTIVE ROLES

THE PSYCHOLOGICAL EFFECTS OF UNEMPLOYMENT.

Eisenberg, P., & Lazarsfeld, P. F. (1938).

Psychological Bulletin, 35, 358–390.

''Unemployment tends to make people more emotionally unstable than they were previous to unemployment.''

Fortney, J. C., S. Xu, et al. (2009). "Community-Level Correlates of Hospitalizations for Persons With Schizophrenia." Psychiatric Services 60(6): 772 '

" An important finding was that schizophrenia-related hospitalization rates were higher in counties with high levels of poverty and unemployment"

Hard Times and Hurtful Partners:
How Financial Strain
Affects Depression & Relationship Satisfaction
of Unemployed Persons & Their Spouses

Vinokur, A., Price R., & Caplan, R. (1996).

Journal of Personality & Social Psychology, 71 (1), 166-179.

"Financial strain - significant effects on depressive symptoms of both partners, which led the partner to withdraw social support"

IS WORK GOOD FOR
YOUR HEALTH & WELLBEING?
WADDELL, G. & BURTON, K. (2006)
Cited in:

FINDING & KEEPING WORK:
ISSUES, ACTIVITIES, & SUPPORT FOR THOSE
WITH MENTAL HEALTH NEEDS
BOOTH, D., FRANCIS, S., & JAMES, D. (2007)

JOURNAL OF OCCUPATIONAL PSYCHOLOGY,
EMPLOYMENT, & DISABILITY
V 9, NO. 2, AUTUMN 2007

Rueda, S., L. Chambers, et al. (2012). "Association of Returning to Work With Better Health in Working-Aged Adults: A Systematic Review." American Journal of Public Health 102(3): 541-556.

Results. 18 studies including 1 RCT. 15 studies revealed beneficial effect returning to work on health, either demonstrating significant improvement in health after reemployment or significant decline in health attributed to continued unemployment. Evidence for health selection, suggesting that poor health interferes with people's ability to go back to work. Some evidence earlier reemployment may be associated with better health.

Conclusions. Beneficial health effects of returning to work have been documented in a variety of populations, times, settings. Return-to-work programs may improve not only financial situations but also health.

"Income & psychological distress: The role of the social environment"

Heather M. Orpana, Louise Lemyre and Ronald Gravel

STATISTICS CANADA 2009

Low income is an important risk factor for becoming psychologically distressed

BEING IN RIGHT TYPE OF WORK GOOD FOR:
HEALTH, QOL, SELF ESTEEM –
APPLIES TO ALL AGE GROUPS

UNEMPLOYMENT:
MORE SICKNESS, DISABILITY, OBESITY,
USE OF MEDS, USE OF MED SERVICES,
DECREASED LIFE EXPECTANCY

RETURNING TO WORK AFTER UNEMPLOYMENT
IMPROVES HEALTH BY AS MUCH AS
UNEMPLOYMENT DAMAGES IT

Dooley, D., Fielding, J., & Levi, L. (1996). Health and unemployment. Annual Review of Public Health

Kasl, S. V., Rodriguez, E., & Lasch, K. E. (1998). The impact of unemployment on health and well-being.   In B. Dohrenwend, (Ed.). Adversity, Stress and Psychopathology

Lennon, M. C. (1999). Work and unemployment as stressors. In A. Horwitz, & T. Scheid, (Eds.). A Handbook for the Study of Mental Health: Social Contexts, Theories and Systems

Libby, A. M., V. Ghushchyan, et al. (2010). "Economic Grand Rounds: Psychological Distress and Depression Associated With Job Loss and Gain: The Social Costs of Job Instability." Psychiatric Services 61(12): 1178-1180.- depressed employed less distressed than depressed unemployed

Axelsson, L. and G. Ejlertsson (2002). "Self-reported health, self-esteem and social support among young unemployed people: a population-based study." International Journal of Social Welfare 11(2): 111.

Bruffaerts, R, Sabbe, M., Demyttenaere, K. (2004)
Effects of Patient & Health-System Characteristics on Community Tenure of Discharged Psych Inpatients
Psych Serv 55:685-690, June 2004
-- increases in rehospitalization

Dooley, D., Catalano, R., & Hough, R. (1992).
Unemployment and alcohol disorders in 1910 and 1990: Drift versus social causation. Journal of Occupational & Organizational Psych   -----   increases alcohol use

Fergusson, D. M., Horwood, & Woodward, L. J,. (2001). "Unemployment and psychosocial adjustment in young adults: causation or selection?" Social Science & Medicine 53(3): 305-320 --- Unemployment correlated with SA, suicidal thoughts, and criminal activity

Elbogen, B.E. & Johnson, S. C. (2009) Intricate Link Between Violence and Mental Disorder. Archives of General Psychiatry 66(2): 152-161. --- unemployment significantly correlated with violence in the group

Linn, M. W., Sandifer, R., & Stein, S. S. (1985). Effects of unemployment on mental and physical health. American Journal of Public Health ---- increases in anxiety

Dooley, D., Catalano, R., & Wilson, G. (1994). Depression and unemployment: Panel findings from the Epidemiologic Catchment Area study. American Journal of Community Psychology ----- increases in depression

Mathers, C. and Schofield, D. (1998) 'The Health Consequences of Unemployment: The Evidence', Medical Journal of Australia, 168 (4),   pp. 178–82 – general health deteriorates

Yueh-Ching Chou, Cheng-Yun Pu, Teppo Kröger, Li-yeh Fu (*2010*) Caring, Employment, and Quality of Life: Comparison of Employed and Nonemployed Mothers of Adults With Intellectual Disability. American Journal on Intellectual and Developmental Disabilities: September 2010, Vol. 115, No. 5, pp. 406-420- – general health deteriorates

Murphy, G.C. & Athanasou, J.A (1999).
The Effect of unemployment on mental health.
Journal of Occupational and Organizational Psychology
--- large effect size for employment positive, smaller effect size for unemployment as bad.

Darity, W.A. (2003).
Employment Discrimination, Segregation, and Health.
American Journal of Public Health 93[2], 226-231.
--- bouts of unemployment lead to lower self esteem, lower motivation

Darity, W.A. (1999).
Who Loses from unemployment.
Journal of Economic Issues
--- cross national data: greater spousal abuse and suicide

Winefield, A. H., H. R. Winefield, et al. (1991). "A longitudinal study of the psychological effects of unemployment and unsatisfactory employment on young adults." Journal of Applied Psychology 76(3): 424-431.

Winefield, A.H., Tiggemann, M., Winefield, H.R., & Goldney, R.D. (1993).
Growing up with unemployment: A longitudinal study of its psychological impact.
--- youth with similar characteristics in school after long term unemployment more depression and anxiety

Popham, F., K. Skivington, et al. (2013). "Why do those out of work because of sickness or disability have a high mortality risk? Evidence from a Scottish cohort." The European Journal of Public Health 23(4): 629-635 – longer out of work health grows worse and mortality increases

Claussen, B. (1999). Alcohol disorders and re-employment in a 5-year follow-up of long-term unemployed. *Addiction, 94(1),* 133.--- unemployment lead to drinking not vice versa

Comino, E. J., Harris, E., Silove, D., Manicavasagar, V., & Harris, M. F. (2000). Prevalence, detection and management of anxiety and depressive symptoms in unemployed patients attending general practitioners. *Australian & New Zealand Journal of Psychiatry, 34(1),* 107.--- unemployed greater anxiety and depression

Weich, Scott, and Glyn Lewis. "Poverty, unemployment, and common mental disorders: population based cohort study." *British Medical Journal* 317.n7151 (July 11, 1998): 115(5) -- long term financial strain/ poverty increase amount/duration of MI .

Jin RL, Shah CP, Svoboda TJ. The impact of unemployment on health: a review of the evidence. Canadian Medical Association Journal. 1995;153:529–540. -- strong positive association between unemployment and poor health

Mossakowski*, Krysia (2008) Is the duration of poverty and unemployment a risk factor for heavy drinking? Social Science & Medicine. 67, p.947-955. --- longer does independent of gender, age, race/ethnicity, marital status, prior heavy drinking, and present SES.

Benavides, F. G., Garcia, A. M., Saez-Lloret, I., & Librero, J. (1994). Unemployment and health in Spain: The influence of socio-economic environment. *The European Journal of Public Health*, 4(2), 103.--- Relationship between unemployment, ill health and more use of health services

Crawford, A., Plant, M. A., Kreitman, N., & Latcham, R. W. (1987). Unemployment and drinking behaviour: Some data from a general population survey of alcohol use. *Addiction*, 82(9), 1007-1016.– Unemployed greater binge drinking & adverse results

Montgomery, S. M., Cook, D. G., Bartley, M. J., & Wadsworth, M. E. J. (1999). Unemployment pre-dates symptoms of depression and anxiety resulting in medical consultation in young men. *International Journal of Epidemiology*, 28, 95.
--- Unemployment risk factor for psychological symptoms depression requiring medical attention even w/o prior issues

Yur'yev, A., A. Värnik, et al. (2012). Employment status influences suicide mortality in Europe. <u>International Journal of Social Psychiatry</u> 58(1): 62-68.   -
-- Changes in employment rates influence suicide mortality - lack of confidence in employment status & unemployed people's expectations of insufficient income & low living standards.

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Goldberg, R. W., Lucksted, A., McNary, S., Gold, J. M., Dixon, L., & Lehman, A. (2001). Correlates of long-term unemployment among inner-city adults with serious and persistent mental illness. *Psychiatric Services, 52*(1), 101.

Kessell, E. R., Catalano, R. A., Christy, A., & Monahan, J. (2006). Rates of unemployment and incidence of police-initiated examinations for involuntary hospitalization in Florida. *Psychiatric Services, 57*(10), 1435.--- Involuntary admissions increase with greater unemployment in labor market

Lerner, D., Adler, D. A., Chang, H., Lapitsky, L., Hood, M. Y., Perissinotto, C., et al. (2004). Unemployment, job retention, and productivity loss among employees with depression. *Psychiatric Services, 55*(12), 1371

Lattimore, R. (2007), *Men Not at Work: An Analysis of Men Outside the Labour Force*, Australian Productivity Commission Paper -- over longer term, prolonged labor force inactivity *associated with* poorer overall health, independent of prior health status

Bartley M and Plewis I. "Accumulated Labour Market Disadvantage and Limiting Long-Term Illness: Data from the 1971-1991 Office for National Statistics' Longitudinal Study." *International Journal of Epidemiology*, 31(2): 336-41, 2002.   --- **Disadvantaged social class or unemployment contributes to chronic illness over 20+ years**

Martikainen P and Valkonen T. "Excess Mortality of Unemployed Men & Women During Period Rapidly Increasing Unemployment." *Lancet*, 348(9032): 909-12, 1996. --- **Individuals who experienced unemployment between 1987 and 1992 had greater mortality than those in employment after control for age, education, occupational class, and marital status.**

Hall, J. P., N. K. Kurth, et al. "Employment as a health determinant for working-age, dually-eligible people with disabilities." Disability and Health Journal- online Dec 12, 2012.   Employment, even at low levels, was associated with better health and health behaviors as well as lower costs

Beiser M, Johnson PJ, Turner RJ. Unemployment, underemployment and depressive affect among Southeast Asian refugees. Psychol Med. 1993;23(3):731--- 743

Breslin FC, Mustard C. Factors influencing the impact of unemployment on mental health among young and older adults in a longitudinal, populationbased survey. Scand J Work Environ Health. 2003;29 (1):5---14.

Bromberger JT, Matthews KA. Employment status and depressive symptoms in middle-aged women: a longitudinal investigation. Am J Public Health. 1994;84 (2):202---206.

Caplan RD, Vinokur AD, Price RH, van Ryn M. Job seeking, reemployment, and mental health: a randomized field experiment in coping with job loss. J Appl Psychol. 1989;74(5):759---769

Ginexi EM, Howe GW, Caplan RD. Depression and control beliefs in relation to reemployment: what are the directions of effect? J Occup Health Psychol. 2000;5(3): 323---336.

Payne R, Jones JG. Social class and re-employment: changes in health and perceived financial circumstances. J Occup Behav. 1987;8(2):175---184.

Soumerai SB, Avorn J. Perceived health, life satisfaction, and activity in urban elderly: a controlled study of the impact of part-time work. J Gerontol. 1983;38(3): 356---362.

Studnicka M, Studnicka-Benke A, Wogerbauer G, et al. Psychological health, self-reported physical health and health service use. Risk differential observed after one year of unemployment. Soc Psychiatry Psychiatr Epidemiol. 1991;26(2):86---91.

Bartley M, Ferrie J, Montgomery SM. "Health and Labor Market Disadvantage: Unemployment, Non-Employment, and Job Insecurity." In: *Social Determinants of Health* Marmot M, Wilkinson RG, editors. 2nd ed. Oxford: Oxford University Press, 2006.

Korpi T. "Accumulating Disadvantage: Longitudinal Analyses of Unemployment and Physical Health in Representative Samples of the Swedish Population." *European Sociological Review*, 17(3): 255-73, 2001.- unequivocal evidence worsening health status due to unemployment

Solano, P., E. Pizzorno, et al. (2012). "Employment status, inflation and suicidal behaviour: An analysis of a stratified sample in Italy." International Journal of Social Psychiatry 58(5): 477-484. – higher risk

Arthur Goldsmith, Washington & Lee University study at APA

Even in resilient people, six months' unemployment has psychological impact,

Americans who were jobless for longer than 25 weeks in the past year were three times more likely than those who were continuously employed to suffer mental health issues for the first time

Gathergood, J. (2013). "AN INSTRUMENTAL VARIABLE APPROACH TO UNEMPLOYMENT, PSYCHOLOGICAL HEALTH AND SOCIAL NORM EFFECTS." Health Economics 22(6): 643-654.

Sizeable causal worsening of psych health from unemployment; negative impact largely mitigated by local labour market conditions: unemployment in localities w. higher unemployment suffer less deterioration psych health.

Böckerman, P. and P. Ilmakunnas (2009). "Unemployment and self-assessed health: evidence from panel data." Health Economics 18(2): 161-179.

Mixed results. But more likely find negative impact of unemployment on health when long term unemployment

Huber, M., M. Lechner, et al. (2011). "Does leaving welfare improve health? Evidence for Germany." Health Economics 20(4): 484-504.

Employment substantially increases (mental) health; driven males & those w. bad initial health; largest for males w. poor health.

Some evidence steady employment associated w. reduced use of MH services.

Bush, P. W., Drake, R. E., Xie, H., McHugo, G. J., & Haslett, W. R. (2009). The long-term impact of employment on mental health service use and costs. Psychiatric Services, 60, 1024-1031.

Highly significant reductions in service use were associated with steady employment.

$166,000 LOWER COSTS OF MH SERVICES FOR WORKING GROUP OVER 10 YEARS

Olesen, S. C., Butterworth, P., Leach, L. S., Kelaher, M.,& Pirkis, J. (2013)

Mental health affects future employment as job loss affects mental health: findings from a longitudinal population study.
BMC Psychiatry, 13, 144, 5/13

MH both consequence & risk factor for unemployment.
Poorer MH attributable to both impact of unemployment & existing MH problems.
Strength of these two effects similar for women,
Results for men suggested effect of unemployment on subsequent MH <
MH on subsequent risk of unemployment.

Training for Physicians- Clinical Decision-Making - Arizona

Webility Corporation

Practical Stuff They Didn't Teach You In Medical School

Evidence-Based

Clinical Decision-Making That Helps

Patients Start, Stay at or Return to

work

Webility Corporation

Worklessness Is Bad for People

- Three pillars of <u>identity</u>: body, work and family.
- Loss of <u>bodily integrity</u> causes anger, grief, depression, uncertainty, threatens identity.
- Loss of <u>work</u> causes anxiety, depression, loss of self-worth, threatens identity.
- Depression, anger, etc. strain <u>relationships.</u>
- Inactivity slows healing, creates chronic pain.
- "Victimization" disempowers & delays acceptance.
- Increased incidence of poverty, substance abuse, divorce, domestic violence, other morbidity & mortality.

SIDE EFFECTS OF UNEMPLOYMENT IN THE GENERAL POPULATION

- Increased substance abuse

- Increased physical problems

- Increased psychiatric disorders

- Reduced self-esteem

- Loss of social contacts

- Alienation and apathy

Warr, P.B. (1987), *Work, Unemployment and Mental Health*, Clarendon Press, Oxford

" WHAT DRIVES ME UP THE WALL IS THE INTENTIONAL TEACHING OF FEAR OF HAVING ANY KIND OF MEANINGFUL LIFE BECAUSE 'YOU WILL DECOMPENSATE' OR ' YOU ARE STRESS SENSITIVE'. THE MOST STRESSFUL THING IN THE WORLD IS BEING A COUCH POTATO WITH NOTHING TO DO, NO WHERE TO GO, AND NO ONE TO TALK TO. "

ED KNIGHT, PH.D.

A man with schizophrenia once told him he could cope with the voices in his head.

"But it was the poverty, the unemployment, the homelessness," Kevin Martone of TAC (former Dir of MH in NJ) recalled, "and the fact that he was going to die 25 years sooner than the general population. Those were the big issues for him."

Appendix I

Employment Professional Competencies

Association of Community Rehabilitation Educators

Key Content & Competencies Needed For Employment Specialists Within
Behavioral Health Systems

APSE Supported Employment Competencies

2013
ACRE COMPETENCIES:
EMPLOYMENT SERVICES

ACRE

Association of Community
Rehabilitation Educators

Understanding the ACRE Vision for Employment Services

ACRE members believe that the quality of employment services to individuals with disabilities can be improved by ensuring that the training available to provider staff is of a high quality. To quantify high quality, ACRE uses 4 domains (following APSE's domain model) and 38 competencies to evaluate curricula and training approaches, as well as requiring documentation of trainer qualifications and experience.

Establishing Competencies

APSE (the Association of People Supporting Employment First) has promoted community employment for people with disabilities since 1988. APSE assembled nationally recognized experts to establish the first formal set of supported employment competencies for employment providers in February 2001 (by Flippo, Rogan, Geary, Martin Luecking, Keul, Harrison, Harvey, Dutton, Drouet, Niemiec, McDonald, Killam, Quinn, DiLeo, Hoffman, and the NJ APSE Chapter).

In collaboration with APSE, ACRE refined and expanded the APSE competencies so that they would extend beyond supported employment. The expanded competencies include multiple approaches to employment for people with disabilities, including competitive employment, Customized Employment, supported employment, and transitional employment.

The first ACRE competencies were released in 2004 (by G. Brandenburg, L. Bandy, L. Ford, L. Fussell, S. Hartnett, L Holloway, D. Martin-Lueking, W. Quarles, C. Sax, P. Todd, J. Trach, D. Wilkerson). The 2013 competencies reflect recent revisions in the APSE competencies, as well as those made by the ACRE Competency Committee and Board members (see names below).

ACRE Certificate Programs and Curriculum Review Process

ACRE competencies are the basis for two levels of employment services certification: the Basic Employment Services Certificate (a minimum of 40 hours of training), and the Professional Employment Services Certificate (40 additional hours of training, plus a minimum of one year of experience in the field). Based on the certification level, each competency is assigned either knowledge (K) or skill (S) as a requirement of the outcome of the training.

Organizations wishing to provide training that bears the ACRE seal of approval must become ACRE members and submit their curriculum to ACRE for review. Instructions for submission are located on the ACRE website: www.acreducators.org

ACRE acknowledges the following people for their work to develop the 2013 competencies:

Judi Goldston, *Committee Chairperson*
Bethany Bilodeau
Gayann Brandenburg
Rebecca Cook
Vicki Ferrara
Laurie Ford
Liz Fussell
Cecilia Gandolfo
Martha Garber
Melanie Jordan
Sheila Mahon
Amy Scott
Dale Verstegen

Domain 1: Application of Core Values and Principles to Practice

K: Knowledge
S: Skill

Basic Level	Professional Level	Competency
K	K	1. Differences between traditional segregated employment and contemporary community models of employment, with emphasis on equal access in the general workforce, zero exclusion, and full inclusion.
K	S	2. Underlying values, ethical guidelines, definitions, and philosophy of community employment: a) Define "normalization" (social role valorization) and its guiding principles. b) Identify how support strategies can enhance or detract from the image of a worker with a disability. c) Discuss the benefits of integration at the workplace for people with disabilities. d) Differentiate between individual and group approaches to employment. e) Identify strategies for incorporating disability etiquette instruction in employment settings specific to individuals. f) Discuss the use of person-first language in all interactions, including those with employers. g) Discuss multicultural impacts and considerations in services delivered.
K	K	3. Informed choice, self-determination, and active participation throughout the employment process, emphasizing job-seeker strengths, interests, and talents.
K	S	4. Best practices in community employment services, from intake to follow-along: a) Motivational interviewing techniques b) Customized employment c) Use of natural supports d) Supported employment e) Evidence-based practices f) Transition and school-to-work practices
K	K	5. Rights and responsibilities of individuals in community employment.
K	K	6. History and status of community employment services in your state.
K	K	7. State-specific and federal legislation, regulations, and legal decisions related to community employment, including but not limited to the Americans with Disabilities Act (ADA) and amendments, Workforce Investment Act (WIA), the Rehabilitation Act, Ticket to Work And Work Incentives Improvement Act (TWWIIA), Individuals with Disabilities Education Act (IDEA), the Fair Labor Standards Act and other Department of Labor (DOL) regulations, Olmstead as well as the Equal Employment Opportunities Commission (EEOC) and its role, and the Employment First Initiatives.
K	K	8. State/federal funding streams that support employment services (e.g., vocational rehabilitation (VR), mental health, developmental disabilities, Medicaid waivers, Ticket to Work).
K	K	9. Local and national resources including the discrimination complaint process in your state as it relates to the ADA and amendments, Independent Living Centers, and Protection & Advocacy networks.
K	S	10. Professionalism for employment specialists: a) Interact with job seekers, family members, employers, potential employers, and other providers in a respectful, non-judgmental, and professional manner. b) Dress in a manner that fits the environment and occasion. c) Write reports, case notes, emails, etc. that are purposeful and concise while also neat, objective and easily understood.

Domain 2: Individualized Assessment and Employment / Career Planning

Basic Level	Professional Level	COMPETENCY
S	S	11. Assisting job seekers with making a decision about disclosure considering both the risks and benefits of disclosing and providing approaches to disclosing.
K	K	12. Best employment practices for youth with disabilities transitioning from school, including transition into post-secondary programs.
K	K	13. Effectiveness and limitations of traditional vocational evaluation for people with significant disabilities.
S	S	14. Personal career profile development: a) Encourage the active participation and decision-making of the person served in the career planning process. b) Interview the individual and others familiar with his/her abilities and work history. c) Identify the impact of an individual's cultural and social background, including socio-economic status, race, gender, ethnicity, native and spoken language, and sexual identity, as well as his/her role in the family, religious organization, and community. d) Review individual's records and collect pertinent information related to employment. e) Observe the individual in his/her current daily routines and environments. f) Explore non-work needs that may impact the achievement and maintenance of employment, as well as work-life balance (money management/banking, social/recreational needs once employed, getting up and ready for work, and scheduling appointments so they don't conflict with the work schedule). g) Assess the individual's preferred style of learning, environmental tolerances, and preferred modes of communication, as well as their expressed interests in jobs, careers, or specific tasks. h) Integrate relevant employment information regarding each person served into a vocational profile. i) Use informational interviewing, job shadowing, and other work-based opportunities to explore careers and identify possible job tasks.
S	S	15. Situational assessments, paid work trials, job tryouts, volunteer work, and job shadowing, including assistive technology and other accommodations: a) Develop career exploration sites aligned with the interests and desires of each individual. b) Assess needed environmental or job-task modifications for the person to succeed in his/her choices of employment settings. c) Assess the availability of community supports and transportation. d) Conduct situational assessments, paid work trials, job tryouts, volunteering, and job shadowing. e) Understand Department of Labor guidelines regarding unpaid work. f) Identify techniques and resources to address business concerns about liability risks associated with situational assessments/job tryouts.
K	S	16. Social Security benefits and the impact of wages on Supplemental Security Income (SSI), Social Security, Disability Insurance (SSDI), Medicaid, and Medicare: a) Understand the differences between SSI and SSDI. b) Identify strategies to reduce or eliminate dependence on benefits, specifically Social Security work incentives such as Plans for Achieving Self-Support (PASS plans), Impairment Related Work Expenses (IRWEs), Ticket to Work, Medicaid Buy-in, Continued Medicaid Eligibility (1619B), Student Earned Income Exclusion (SEIE), etc. c) Identify local and national resources for additional benefits planning information.
K	K	17. Self-employment opportunities: a) Examples of self-employment b) Local and national resources c) VR's role in self-employment
K	K	18. Making referrals to appropriate agencies, organizations, and networks based on individual career plans.

Domain 3: Community Research and Job Development

K: Knowledge
S: Skill

Basic Level	Professional Level	COMPETENCY
K	S	19. Marketing plans targeted to employers, including researching opportunities and organizing information gathered: a) Explore local and national labor market information for employment trends via the Internet, market surveys, outreach to business groups, etc. b) Develop a system for organizing information on businesses and business contacts, including new area businesses and types of jobs available in the local area. c) Analyze the gathered information to inform the job development process.
K	S	20. Effective marketing tools for community employment: a) Develop and use marketing tools, including employment brochures, fact sheets, cover letters to businesses, and business cards. b) Use the personal and professional networks of job seekers and employment staff, including targeted use of social media. c) Plan and deliver presentations to groups of individuals and parents, advocacy groups, local civic organizations, service providers, and employers. d) Participate in community business organizations (career centers, Chambers of Commerce, etc.). e) Consult with businesses on disability issues.
S	S	21. Effective marketing messages for community employment: a) Promote the agency as a resource to help businesses meet their hiring needs while accurately explaining services. b) Target messages to audience needs, rather than offering only one generic presentation or brochure. c) Use language and images that highlight skills, abilities, and interests of job seekers. d) Use language and images that respect the job seeker's disclosure choices. e) Share information about incentives to businesses when hiring job seekers with disabilities (e.g., tax credits, on-the-job training, diversity goals).
S	S	22. Developing relationships with businesses: a) Target and identify businesses to contact based on job seekers' needs, interests, and personal networks. b) Use informational interviews, tours, and observations to better understand the business culture and build a relationship with the employer. c) Provide information about disabilities, inclusive hiring, accommodations, etc. to potential employers. d) Respond to businesses' concerns about job seekers' abilities, interests, and challenges in the workplace. e) Maintain the business perspective, emphasizing to employers the benefits of hiring a diverse staff. f) Conclude employer contact with clear next steps (interview, job offer, situational assessment, etc.).
S	S	23. Assisting job seekers in developing portfolios, resumes, cover letters, letters of introduction, references, and other job application documents in various media, including electronic and print.
S	S	24. Assisting job seekers in their job search process: a) Identify potential employers, schedule tours or informational interviews, complete job applications, and arrange job interviews. b) Support job seekers' disclosure decisions and advise about the best disclosure practices. c) Use social media/electronic media, as well as traditional job search resources.
S	S	25. Job matching considerations: a) Identify/clarify existing job descriptions. b) Identify/clarify unmet employer needs. c) Understand workplace cultures and climates. d) Consider transportation options.
K	S	26. Negotiating accommodations and job details, including hours, wages, tasks, work area, breaks, orientation, training, supports, and developing employment proposals based on business and job seeker preferences.

Domain 4: Workplace and Related Supports

Basic Level	Professional Level	COMPETENCY
K	K	27. Building collaborative relationships with: a) Job seeker/employee b) Employer, supervisor, coworkers (solicit employer feedback on satisfaction with employment services) c) Natural and paid supports d) Family e) Other providers, including housing/residential staff, clinicians, etc.
K	K	28. Managing travel/transportation: a) Facilitate transportation to and from work (natural supports, paid transportation agreements, etc.). b) Provide travel training. c) Explore creative transportation solutions.
K	K	29. Ensuring that the employee enters the job in the most inclusive manner possible: a) Maximize the employee's hours on the job, including natural social times (breaks and lunch). b) Support worksite personnel in introducing the new employee to coworkers. c) Maintain adherence to typical new employee orientation and training procedures. d) Make sure that necessary modifications and accommodations are in place. e) Establish clear employer and employment service expectations.
S	S	30. Comprehensive job analysis: a) Identify strategies for creating/designing jobs that make use of integrated and natural supports. b) List in sequence the duties and requirements of the job as well as the approximate time required to perform each task. c) Describe job skills needed for an employee to perform the job functions. d) Identify reinforcers that are natural to the work site (e.g., praise from a coworker or boss; taking a break).
K	S	31. Helping individuals meet social/behavioral expectations of the workplace culture: a) Identify cultural norms of the workplace. b) Describe behaviors in measurable and observable terms. c) Describe the events and situations that precede the occurrence of challenging behaviors. d) Identify consequences that follow these behaviors. e) Assess the communicative functions of these behaviors. f) Evaluate options before implementing behavioral interventions. g) Support individuals to acquire socially acceptable behaviors.
S	S	32. Strategies for developing workplace supports: a) Explore workplace/culture for opportunities for natural supports and how to implement them. b) Model good interactions with the employee from which other workplace personnel may learn. c) Facilitate training of the employee by his/her coworkers. d) Facilitate supports that promote inclusion and good social interactions rather than those which may be stigmatizing or stereotyping. e) Facilitate mentor relationships between the employee and his/her coworkers.
S	S	33. Providing systematic instruction based on individual learning styles and needs, including task analysis with baseline and scheduled data collection, natural cues, and reinforcement procedures.
S	S	34. Maximizing worker job performance and social integration to achieve job stability: a) Develop strategies to increase worker productivity/efficiency. b) Assist the worker in using self-management strategies. c) Identify strategies to increase the employee's tolerance to workplace changes, including new or multiple supervisors, added job duties, scheduling adjustments, and coworker assignments. d) Identify strategies to mitigate job stress and anxiety.

Domain 4: Workplace and Related Supports, *continued from previous page*

K	K	35. Methods for providing long-term support for individuals, families, employers, and coworkers, including how these supports are funded.
K	K	36. Strategies to provide support to the employee and employer in the event of a job separation or termination.
K	S	37. Providing an ongoing review of the employee's performance and satisfaction with the job: a) Determine the supervisor's and coworkers' satisfaction with employee performance. b) Determine additional or different support needs. c) Conduct on-site observations to evaluate job performance. d) Gather input from others (family/residential, counselors, other professionals) about how the job is going for the worker. e) Explore opportunities for career advancement.
K	S	38. Accommodations and universal design strategies that match the needs of the worker and employer: a) Identify commonly available and non-stigmatizing accommodations and modifications. b) Develop individualized adaptations, including low-tech and no-tech solutions. c) Explore universal design strategies for accommodations and solutions, and explain their utility to the employer. d) Identify resources and options for assistive technology. e) Teach the employee to use the accommodation strategy selected. f) Evaluate the need for/appropriateness of accommodations on an ongoing basis.

This grid provides guidance on the number of hours of training required for each of the domains. The information will help organizations preparing to create curriculum or submitting curriculum for review.

Topic Area	Required Hours: Basic	Suggested Hours: Professional
Application of Core Values & Principles to Practice * Rights, history, legislation, best practices, professionalism	4	
Individualized Assessment and Employment / Career Planning * Assess strengths, skills, interests, situational assessment, career exploration, support plan, stakeholder involvement, work impact on benefits, accommodation plan, transition to work models	6	
Community Research and Job Development:		
* Preparing marketing approaches and materials for job developer and job seeker (brochures, resumes, profiles and other materials, planning job seeker involvement and decision making, assistance with disclosure and accommodations requests, networking, development of skills for outreach and interactions with employers to explore their needs, as well as conducting community research including labor market info, range of employers in the area and info on specific employers or industries)	5	
* Job Acquisition (involvement of job seeker, disclosure decisions, accommodations, negotiations, job creation/carving and closing the deal)	5	
Workplace and Related Supports * Job analysis, starting the job, implementing support plans, involvement in usual employer training, systematic instruction, natural supports, social inclusion, fading, positive behavioral supports, ongoing supports and funding, access to resources needed for long-term employment, opportunity for career advancement	10	
Other (Specific Disabilities, etc.)	10	
Total Hours	**40**	
Experience Requirements	**None**	**One Year**

**Description Of Key Content & Competencies Needed For Employment Specialists
Within Behavioral Health Systems**

Content And Competency Areas:
1) Person-Centered Career- Strengths Based Planning
2) Presenting The Individual
3) Methods For Establishing Contacts
4) Social Skills Needed For Job Development
5) Identifying Job Opportunities In The Community
6) Customer Service & Relationship Building
7) Securing The Deal- Getting To Yes
8) Connecting With A *Champion Or An Ally* In The Company
9) Using The *Champion* Effectively
10) Negotiating
11) Using Long Term Business Partners To Cultivate New Ones
12) Using Networking As A Job Development Strategy
13) Specialized Advocacy Issues For People With Mental Illness
14) Keeping In Touch/ Not Being A Pest
15) Dealing With Disclosure
16) Overview Of ADA - Title I
17) Professional Role In Getting Accommodations
18) Methods Of Accommodation For People With Psychiatric Disabilities
19) Building Links With The "Natural Support" Networks- Family, Friends
20) "Simple" Job Analysis And Job Carving Issues

Process That Should Be In Place For Monitoring And Developing These Competencies:

The Behavioral Health authority (perhaps in conjunction with DVR) should develop a training plan involving existing and newly developing training resources that would attend to each of these competencies. The goal is that all staff needing these developed will have access to training opportunities offering at least exposure to and ideally competency in each of these areas by XXX. A listing of training offered through Behavioral Health, DVR, universities and other local services and what of the general competency areas are covered by these options will be developed by local personnel. The Executive Leadership teams of Behavioral Health, DVR, ? others should agree to this competency list and achievement date.

Two options can be presented: Simple but completely prescriptive: Mandatory training attendance for each of the employment specialists. Alternative that leaves more provider discretion but more cumbersome and requires more work on their part and acceptance of monitoring on Behavioral Health/ DVR part. This option would be: Once agreed to, program administrators will be responsible for developing an individual professional development plan related to these competencies for each of the employment specialists. This plan will contain either 1] agreement that the designated specialist attend each of the trainings identified and/ or 2] an alternative plan for developing each of the competencies identified and/ or 3] justification on what leads the supervisor to assume that the specified employment specialist already has the competencies desired.

APSE Supported Employment Competencies

These competencies are based on the work of APSE's various workgroups on certification, quality indicators, and competencies; involving the volunteer efforts of several people: Karen Flippo, Pat Rogan, Tammara Geary, Debra Martin Luecking, Pat Keul, Tom Harrison, Brenda Harvey, Dale Dutton, Renee Drouet, Bob Niemiec, Rebecca McDonald, Sue Killam, Linda Quinn, Dale DiLeo, Rob Hoffman, and the New Jersey APSE Chapter.

OBJECTIVES: Will demonstrate knowledge of…

Introduction to Supported Employment

1. Supported employment contrasted with traditional vocation services: Factors that led to the emergence of supported employment, the difference between supported employment and traditional vocational services, and the unique characteristics of supported employment, including the difference between the "readiness" and the "place-train" models of supported employment

2. Underlying values and definition of supported employment.
   a) define "normalization" and its guiding principles.
   b) identify how support strategies can enhance or detract from the image of a worker with a disability.
   c) discuss the benefits of integration at the workplace for people with disabilities.
   d) differentiate between individual and group approaches to employment.

3. Informed choice, self-determination, and active participation throughout the employment process.

4. Rights and responsibilities of individuals in supported employment.

5. Roles and responsibilities of administrators and program managers in facilitating supported employment.

6. Roles and responsibilities of employment specialists, families and friends, and employers in providing and facilitating supported employment opportunities.

7. Legislation and regulations related to supported employment, including the ADA, WIA and the Rehabilitation Act, TWWIIA, IDEA, the Fair Labor Standards Act, EEOC, and other DOL and IRS laws.

8. Best practices in supported employment services from intake to follow-along.

9. Best practices in school-to-work and community living transition.

10. Funding options for supported employment, including VR, MH, DD, and Medicaid Waivers.

11. History and status of supported employment services in your state.

Assessment and Career Planning

12. Traditional vocational evaluation: effectiveness and limitations for people with significant disabilities.

13. Person-centered planning processes, including personal futures/PATH planning, developing circles of support, and their relationship to career planning. 14. Personal career profile development.
   a) encourage the active participation and decision making of the person

served in the career planning process.
b) interview the individual and others who are familiar with his or her abilities and work history.
c) identify the impact of an individual's cultural and social background, including class, race, gender, culture, and ethnicity, as well as role in family, church, and community; native and spoken language; and family income.
d) review individual records and collect pertinent information related to employment.
e) observe the individual in his or her current daily routines and environments.
f) explore non-work needs that may impact the achievement and maintenance of employment outcomes.
g) assess the individual's preferred style of learning, work skills and tolerances, and preferred modes of communication.
h) integrate relevant employment information regarding each person served into a vocational profile.

15. Situational assessments, paid work trials, job tryouts, volunteer work, or job shadowing: uses and procedures.
a) develop career exploration sites aligned with the interests and desires of each individual.
b) assess needed environmental or job-task modifications for the person to succeed in his or her choices of employment settings.
c) assess the availability of community supports and transportation.
d) conduct effective situational assessments, paid work trials, job

tryouts, volunteering, and job shadowing.

16. Assisting individuals to develop personal career goals and meaningful career plans.

17. Writing meaningful vocational objectives.

18. Making referrals to appropriate agencies, organizations, and networks based on individual career plans.

Marketing and Job Development
19. Marketing plans targeted to employers.
a) gather current information about local job opportunities, including labor trends, employer needs, and job requirements.
b) use local employment studies, conduct market surveys, research business groups, and other methods for updating information about employment opportunities in the local job market.
c) develop a viable Employer Advisory Committee.
d) target and identify types of businesses to contac tbased on the needs and interests of job seekers.
e) develop a system for compiling and organizing information on businesses.
f) develop a file of pertinent information on each employer identified.
g) maintain updated information on new area businesses, type of jobs available, and locations of job sites within the community.
h) analyze the gathered information to identify trends in the local job market.

20. Effective marketing messages for supported employment.
> *a) position the agency as an employment service.*
> *b) target messages to audience needs.*
> *c) describe services that the agency provides to employers.*
> *d) use language and images that do not disclose the presence of disabilities in the job seekers represented.*

21. Effective marketing tools for supported employment.
> *a) publication strategies for marketing employment services, including: employment brochures, employment fact sheets, cover letters to businesses*
> *b) presentations to individuals and/or parent groups ,advocacy groups, local civic organizations, service providers, and employers.*
> *c) participation in community business organizations.*
> *d) consultant to businesses on disability issues.*

22. Job seeker portfolios, including resume, letters of introduction, and references.

23. Personalized job development and relationship marketing, utilizing personal networking.

24. Maximally involving job seekers in the job search process, including participation in completing job applications and interviews.

25. Understanding workplace cultures and climates.

26. Job matching strategies.

27. Employer contact, including approaches and presentations.

28. Negotiating typical job designs, including hours, wages, tasks, work area, breaks, orientation, training, and supports.

29. Job carving: identifying and recommending job carving options.

30. Equal Employment Opportunity Commission regulations that govern non-disclosure of disability to employers.
> *a) identify job development and marketing issues that arise related to disclosure.*
> *b) appropriately handle employer questions about job seekers' disabilities.*

31. Work incentive provisions available to employers for hiring employees with disabilities, including: Work Opportunity Tax Credit, Arc Wage Reimbursement Program, Disabled Access Tax Credit, Architecture?/Transportation Tax Deduction, VR On-the-Job Training Wage.

32. How to close employer contact meetings that result in a job or interview offer.

On-the Job Training and Supports
Job Acquisition
33. Appropriate communication with relevant team members (e.g., job seeker, parents/caregiver, rehabilitation counselors) to ensure all members are fully informed.

34. Social security benefits and their impact on employment.

35. Preparations for the first day on the job (e.g., transportation, employment-required medical examinations and testing, special equipment, uniforms).

Job Analysis and Design
36. Comprehensive job analysis
 a) identify strategies for creating or designing jobs that make use of integrated and natural supports.
 b) evaluate the integration potential offered by a position, including physical, social, and cultural factors.
 c) determine effective methods to establish natural supports within work environments.
 d) list job duties and requirements of the job in sequence and the approximate time required to perform each task.
 e) identify and describe each job skill that an employee will be required to perform.
 f) identify job modification and accommodation strategies.
 g) identify reinforcers natural to the work site.

Worker Orientation
37. *Travel/transportation arrangements and training for getting to and from the job.*

38. Strategies for establishing effective entry into a job.
 a) maximize hours on the job, including natural social times (breaks and lunch).
 b) ensure the new employee is introduced to coworkers by worksite personnel.
 c) Adhere as closely as possible to typical new employee orientation and training procedures.
 d) Ensure necessary modifications and accommodations are in place.

Workplace Supports
39. Strategies for developing workplace supports.
 a) define natural supports and rationales for their use.
 b) analyze work cultures to better understand sources of support and social relationships at the worksite.
 c) facilitate training of supported employees by coworkers.
 d) identify artificial support strategies that can stigmatize or stereotype supported employees.
 e) facilitate mentor relationships between supported employees and coworkers.

40. Systematic training, including task analysis, natural cues and reinforcers, error correction procedures, and self instruction techniques.
 a) task analyze job duties that require instruction.
 b) conduct a baseline assessment from a task analysis.
 c) analyze baseline data.
 d) establish an instructional plan that includes: schedule for training, instructional procedures, natural prompts, natural reinforcers, reinforcement procedures, and evaluation/data collection procedures.
 e) utilize effective verbal, visual, auditory, and/or tactile prompts.
 f) understand individualized reinforcement strategies, including: reinforcement preferences and hierarchies, satiation effects, effect of quantity and quality, and natural versus artificial approaches.
 g) define the various reinforcement schedules: continuous, fixed ratio, variable ratio, fixed interval, variable interval, and how to fade

reinforcers to naturally occurring levels.
h) identify and promote use of naturally occurring reinforcers and natural cues.
i) develop data collection procedures using frequency, duration, interval, and performance scoring.
j) describe how to enhance natural cues and reduce dependence on prompts.
k) describe strategies to systematically fade prompts and other forms of assistance.
l) analyze a graph to determine the progress of a worker over time.

Job Site Adaptations
41. Job adaptations and accommodations that match the needs of the worker and employer.
a) identify commonly available and non-stigmatizing accommodations and modifications.
b) develop individualized adaptations.
c) teach the use of assistive technology.
d) assess the ongoing need for, and appropriateness of, adaptations and accommodations.

Appropriate Social Behavior on the Job
42. Assisting individuals to meet the social behavior expectations of the workplace culture.
a) identify cultural norms of the workplace culture.
b) describe behaviors in measurable and observable terms.
c) assess the communicative functions of behavior.
d) identify consequences that may maintain interfering behaviors.
e) identify considerations before implementing

behavioral procedures.
f) describe the relationship between behavior and environment, including the events and situations that predict occurrences of behaviors.
g) Develop appropriate strategies for supporting individuals to acquire social behaviors.
h) understand methods of reinforcement procedures, including DRO, DRI, DRL and Alt-R. Stabilization

43. Maximizing worker job performance and social integration.
a) monitor worker on-task behavior.
b) develop strategies to increase worker productivity, if necessary.
c) assist the worker in using self-management strategies.
d) expand worker performance so it generalizes across supervisors, job duties, and diverse social contexts.

Ongoing Supports
44. Sources for long-term, ongoing support.

45. Supporting individuals, families, and employers/coworkers over time.

46. Evaluating quality in supported employment services through outcome measurement, satisfaction indicators, and process indicators.

47. Ongoing review of the supported employee's performance
a) determine supervisor's satisfaction with assistance provided by employment consultant.
b) determine supervisor's satisfaction with performance of supported employee.
c) determine additional or different support needs.

d) obtain additional information regarding supported employee's progress from family members, coworkers, counselors, or support coordinators.
e) conduct on-site observations to evaluate job performance.
f) record progress in a consistent manner.

48. Collaborative working relationships with other human service professionals.

49. Supporting the job seeker and family in self-advocacy.

50. Circles of support as an ongoing resource.

51. Community resources that will assist supported employee in maintaining and improving his or her quality of life.

52. How to handle job stress and burnout.

Managing Benefits
53. Work incentives and disincentives.
a) advise individuals about the impact of work on their benefits.
b) write a PASS plan.
c) apply for an IRWE.

Organizational Change
54. Ethics and challenges of operating both integrated and segregated vocational services.

55. Strategies for promoting a unified vision and values within your organization.

56. Strategies for changing the organizational structure to support integrated employment.

57. Strategies for human resource practices that promote and reward integrated employment outcomes.

58. Working as a member of a cross-functional team.

59. Working as a generalist versus specialist.

Special Populations
60. How to support youth with disabilities transitioning to employment.

61. How to support people with mental illness.

62. How to support people with traumatic brain injury.

63. How to support people with sensory disabilities.

64. How to support people with autism.

65. How to support people with physical disabilities.

66. How to support people in culturally-sensitive way**s**, including Latino, African-American, Hmong, and other cultures.

Self-Employment
67. Pros and cons of self-employment.

68. Examples of supported self-employment, business partnerships, and business ownership.

69. Job creation.

70. Developing viable business plans.

71. Sources of funding and resources.

Appendix J

Real Time Labor Market Information

Department of Labor Research on Labor Market Information

TEN 18-12: Release and Availability of Five Employment and Training Administration (ETA) Occasional Papers on the Evaluation of Labor Market Information Improvement Grants

Posted by randee chafkin - On February 05, 2013 (EST)

The ETA Advisory database and is now available at
http://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4599

- Link to research report ETAOP 2013-05:
  http://wdr.doleta.gov/research/keyword.cfm?fuseaction=dsp_resultDetails&pub_id=2499&mp=y
- Link to research report ETAOP 2013-06:
  http://wdr.doleta.gov/research/keyword.cfm?fuseaction=dsp_resultDetails&pub_id=2500&mp=y

Link to research report ETAOP 2013-07:
http://wdr.doleta.gov/research/keyword.cfm?fuseaction=dsp_resultDetails&pub_id=2501&mp=y

TRAINING AND EMPLOYMENT NOTICE	NO. 12-11
	DATE October 24, 2011

TO: STATE WORKFORCE AGENCIES
STATE WORKFORCE LIAISONS
STATE WORKFORCE ADMINISTRATORS
STATE LABOR COMMISSIONERS
STATE AND LOCAL WORKFORCE BOARD CHAIRS
    AND DIRECTORS
STATE VETERANS EMPLOYMENT AND TRAINING DIRECTORS
RAPID RESPONSE COORDINATORS
BUSINESS ENGAGEMENT COORDINATORS
STATE UNEMPLOYMENT INSURANCE DIRECTORS
ONE-STOP CAREER CENTER MANAGERS
JOB CORPS CENTER DIRECTORS

FROM: JANE OATES /s/
Assistant Secretary

SUBJECT: "Translating Labor Market Information (LMI) into Service Delivery"
E-Learning Training Series is Available for Use and Replication

1. Purpose. To announce the availability of the Translating LMI into Service Delivery e-Learning training series, in order to encourage increased use of LMI, workforce information, and economic analyses to improve workforce development decision-making. This e-Learning series was specifically designed to meet the needs of busy workforce development professionals, including One-Stop Career Center front-line staff, managers, business service representatives, rapid response coordinators, workforce investment board (WIB) policy makers, and other stakeholders.   All of the e-Learning training modules and associated supporting materials, including slide shows, implementation instructions, videos, user guides, study aides, and quizzes have been posted on the LMI Win-Win Network Community of Practice Web site (part of Workforce3One) at
https://winwin.workforce3one.org/page/resources/1001111558627793664

2. Background. The Employment and Training Administration (ETA) believes that every service delivery decision made in the workforce development system should be based on accurate and reliable data, information, and an understanding of the current condition of the local, state, and regional economies, projections for growth and/or decline, and the needs of business.

EMPLOYMENT AND TRAINING ADMINISTRATION
U.S. DEPARTMENT OF LABOR
WASHINGTON, D.C. 20210

This e-Learning training series was created to respond to the need for basic LMI training in a manner that is more convenient and less costly than traditional classroom training (although some of the modules permit classroom instruction).

The original e-Learning curriculum was developed in 2009-10 by the ETA technical assistance team, which included subject matter and instructional design experts. ETA then asked the States of Mississippi, Missouri, and Ohio to field test, customize, and implement the e-Learning training in their states in 2010 and 2011. These states have provided their e-Learning training modules at no charge to other state workforce agencies, workforce investment boards, economic development entities, educational and training providers, and other stakeholder organizations.

3. **Overview of the State and Benchmark Versions of the e-Learning Series**

Mississippi

The Mississippi version presumes that trainees have limited LMI experience. Therefore, Mississippi used several tactics to make complex information understandable to this audience. The course incorporates both electronic and in-person training, including an audio track to accompany the presentation slides. To avoid removing too many staff from a single office to assemble a class, MS organized classes on a regional basis at a central location.

Mississippi tested its modules with 10 focus groups that included 75 to 80 individuals, starting with state LMI staff and the Employment Service Division. When the classes proved popular, the project team expanded the training to the state's Veterans' service and the Rapid Response staff.

The Mississippi LMI Fundamentals training includes the following modules:
1. ABCs of Labor Market Information;
2. Utilizing LMI to Help Job Seekers;
3. Using LMI for Skill Assessment, Competency Analysis, and Career Planning;
4. Using LMI to Drive Reemployment Strategies; and
5. Guiding Businesses and Partners to Use LMI Resources.

Missouri

Missouri's Economic Indicator Webinar series relies upon a distance-learning or remote training approach, and includes four modules. The introductory Labor Market Information Fundamentals module serves as a prerequisite for the three advanced modules. Module 2 addresses the needs of One-Stop Career Center staff, and Modules 3 and 4 are intended for business engagement staff, economic developers, and policymakers. Each module consists of two or three self-guided Webinars lasting approximately 20 to 30 minutes each.

Missouri, like Mississippi, assumes that trainees will possess limited LMI knowledge. The training combines Missouri-specific LMI data and data tools with Federal data from the Bureau of Labor Statistics, ETA, and the Census Bureau. The state's

modules include case studies based on the problems and challenges staffers face every day.

Missouri's Economic Indicator Webinar training includes the following modules:
1. LMI Fundamentals;
2. Using Skills Assessments and Career Pathway Planning;
3. Using Economic and Workforce Data to Drive Reemployment and Economic Recovery Strategy; and
4. Guiding Businesses to Use LMI Resources to Support Human Resource Functions.

Ohio

Ohio's LMI e-Learning course was designed to be presented as online training for workforce professionals, and consists of four modules. The LMI Fundamentals module covers basic terms, concepts and various LMI programs, and provides an overview of Ohio's LMI.com Web site (which houses most of the state's LMI resources) as well as non-Ohio LMI sources.

The second module was designed for workforce professionals who work with employers. This three-part series covers how to use LMI to identify employers for outreach, how to use LMI to meet various employer needs, and how to support a business case to attract new employers. The final lesson is a practicum which requires students to complete hands-on exercises during the training lesson.

The third module, for workforce professionals who assist job seekers, focuses on the use of LMI to determine whether participants are likely to return to work without WIA-funded training. This module also explores how to use LMI to investigate alternate career directions, and how to use LMI to make training and re-employment decisions.

The fourth module addresses broader economic development decisions, especially for regions. It includes an Ohio regional economic development case study to demonstrate how to conduct regional analyses. This module's final lesson shows how to use LMI data to respond to economic disasters.

Ohio's LMI E-Learning course includes the following modules:
1. Fundamentals of LMI;
2. Adding Value for Employers;
3. Adding Value for Job Seekers; and
4. Economic Development and Recovery.

Benchmark Version

Benchmarking is a process of identifying a standard in relation to both product and process that is used to understand, evaluate, and identify areas and means for improvement. The benchmark "Fundamentals of LMI" version of this e-Learning

series was developed by the Manhattan Strategy Group and incorporates elements from the 2009 Webinar series and the Mississippi, Missouri, and Ohio E-Learning courses (but does not include state -specific information). This version was designed for adoption and customization by other states and organizations for internal use by an organization and/or individual for non-commercial training purposes.

The self-administered Fundamentals of LMI e-Learning series includes an audio track and the following modules:
1. Introduction to LMI;
2. LMI for the Job Seeker;
3. LMI for Assessing Skills;
4. LMI for Re-Employment; and
5. LMI for Business.

As noted above, all of the e-Learning training series and associated supporting materials —including slide shows, implementation instructions, videos, user guides, study aides, and quizzes — have been posted on the LMI Win-Win Network Community of Practice at
https://winwin.workforce3one.org/page/resources/1001111558627793664

4. **Action Requested.** ETA encourages all states and addressees to review these training materials and to consider implementation of this important e-Learning series within their organization. ETA also requests that recipients of this announcement further publicize the availability of the Translating LMI into Service Delivery e-Learning series to their state and local workforce system partners, interested individuals, and other potentially interested stakeholders.

5. **Feedback and Inquiries.** ETA welcomes feedback regarding the presentation, content, and any other aspect of the e-Learning modules. Please e-mail or call Anthony Dais (dais.anthony@dol.gov or (202) 693-2784) to provide feedback. If you want more information about LMI or workforce information training, please contact the appropriate ETA Regional Office or contact your state workforce agency's LMI, research, or economic analysis entity. The following hyperlink leads to a list of state LMI contacts: http://www.bls.gov/bls/ofolist.htm

Appendices • 135

ESTIMATES EDUCATIONAL, TRAINING & SKILLS
REQUIREMENTS · ESTIMATES WAGES · PROJECTS
FUTURE LABOR MARKET TRENDS · ESTIMATES
HUMAN CAPITAL IN THE LABOR FORCE

LABOR MARKET
ASSESSMENT TOOL

INTRODUCING THE LABOR MARKET ASSESSMENT TOOL

WHAT IS IT? The Labor Market Assessment Tool (LMAT) is the product of a partnership between the Boston Redevelopment Authority's (BRA) Research Division and the Center for Urban and Regional Policy (CURP) at Northeastern University.

LMAT is an interactive computer-based program developed by Alan Clayton-Matthews, a CURP Senior Fellow and Associate Professor of Public Policy at the University of Massachusetts Boston with the assistance of BRA Senior Research Associate Mark Melnik, CURP's Director Barry Bluestone, and the BRA's Research Director Alvaro Lima.
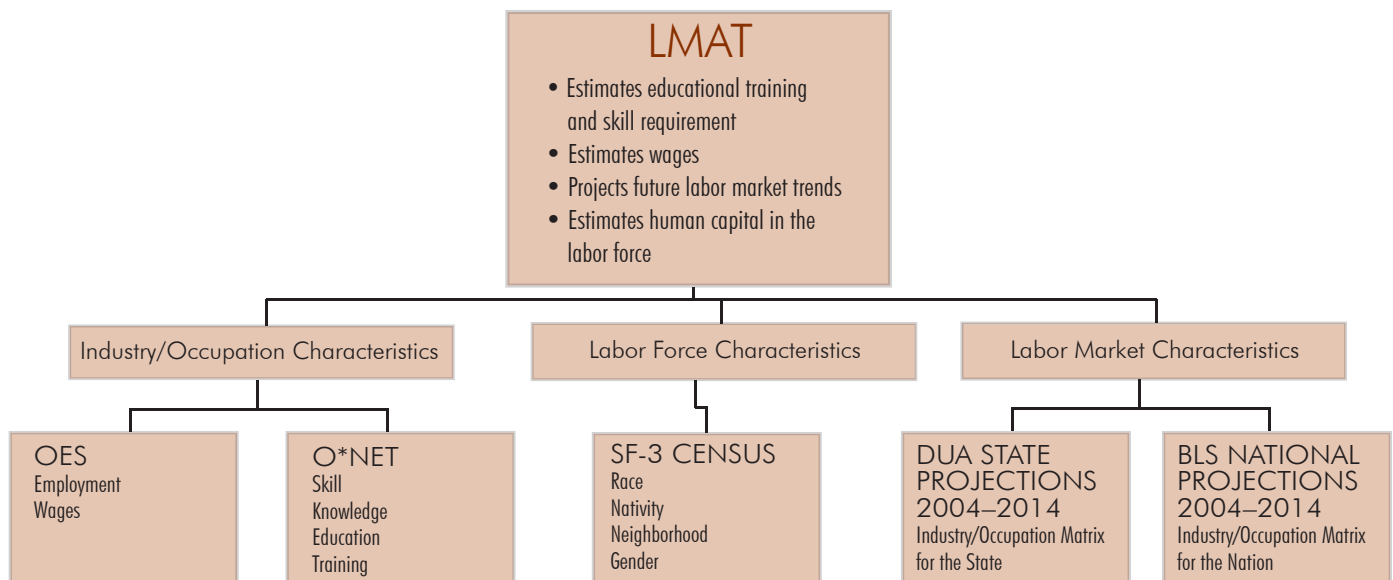
The BRA Research Division collects and analyzes contemporary, historical, and comparative data related to Boston's economy, population, and commercial markets. BRA Research Division data analysis plays a critical role in informing public policy for the City of Boston related to planning, community, and economic development. In addition, the BRA Research Division acts as a resource for Boston residents, private sector groups, academic institutions, community-based organizations, and other governmental agencies.

The Center for Urban and Regional Policy (CURP) at Northeastern University is a "think and do tank"— an organization that brings together faculty, staff, and students at Northeastern to conduct research on a wide range of topics related to urban areas, focusing primarily on the Greater Boston region. CURP often works with community groups, non-profit organizations, and government agencies to collect and analyze data and inform public policy decisions.

WHAT DOES IT DO? LMAT is comprised of various secondary data sources that can be used to examine Boston's labor market. As an interactive computer program, LMAT is capable of estimating wages and the distribution of occupations by educational, skill, knowledge, and training requirements by industry. In addition, the program provides employment projections by educational, skill, knowledge, and training requirements by industry for future labor market scenarios. LMAT can be used, for example, to estimate the difference between the educational attainment and occupational structure of the current labor pool and the workforce requirements of the current labor market. LMAT can also be used to make future employment projections.

In order to do this, LMAT utilizes five different secondary data sources, allowing users to examine a combination of industrial, occupational, and labor force characteristics. To identify industrial and occupational characteristics, including the distribution of skills, wages, education, and training the program uses data developed by the U.S. Department of Labor, specifically the Occupational Employment Statistics (OES) and the Occupational Information Network (O*NET). In order to estimate labor market characteristics, LMAT uses employment data and projections developed by the Bureau of Labor Statistics (BLS) for national trends and the Massachusetts Department of Unemployment Assistance (DUA) for state trends. In order to map labor force characteristics, the program utilizes the Summary File 3 (SF-3) tables of the 2000 U.S. Census.

LMAT

- Estimates educational training and skill requirement
- Estimates wages
- Projects future labor market trends
- Estimates human capital in the labor force

Industry/Occupation Characteristics

OES
Employment
Wages

O*NET
Skill
Knowledge
Education
Training

Labor Force Characteristics

SF-3 CENSUS
Race
Nativity
Neighborhood
Gender

Labor Market Characteristics

DUA STATE PROJECTIONS 2004–2014
Industry/Occupation Matrix for the State

BLS NATIONAL PROJECTIONS 2004–2014
Industry/Occupation Matrix for the Nation

With the use of the OES, O*NET, BLS and DUA projections, and the U.S. Census SF-3 data, this computer program can estimate both the labor demands (e.g. educational requirements, job attributes, and industry characteristics) and the characteristics of the labor supply (e.g. human capital and worker attributes). LMAT can be used to highlight the educational needs and primary skills necessary to work in various occupations or selected industries. By linking together many data sources, LMAT can be used to:

- Simulate different labor market scenarios;
- Analyze the skill compatibility of a single industry, or set of industries with the population of the city;
- Compare labor supply and demand within Boston's labor market;
- Estimate labor supply and demand within projected future labor markets for the City of Boston;
- Identify critical skills as job requirements for selected industries or the entire labor market.

LMAT can be used to highlight the educational needs and primary skills necessary to work in various occupations or selected industries. It can also estimate the typical wages associated with occupations and industries, as well as identify industries and occupations that are likely to grow in the future.

WHAT IS UNIQUE ABOUT LMAT? With over 800 occupational titles, close to 1,200 industrial classifications, approximately 140 different measures of job requirements, and two different sets of employment projections for the year 2014, there are literally a countless number of ways to assess the relationship between industries, occupations, and job requirements in the labor market using LMAT. Being that industries and occupations on LMAT are organized with the most widely used classification systems, it is also possible to link LMAT outputs with other data sources that also use the North American Industrial Classification System (NAICS) and the Standard Occupational Classification (SOC) system.

In terms of looking at the labor force, U.S. Census SF-3 data allows users to look at key human capital and demographic characteristics. These data can be organized by Census Tracts, so it is possible to focus on the human capital and demographic characteristics of specific neighborhoods within the city of Boston.

In short, LMAT is an all-in-one source for analyzing occupational requirements by industry in the labor market, as well as critical demographic and human capital characteristics of the labor force. All of the data sources in LMAT are part of ongoing data collection processes. As a result, LMAT can be updated frequently to use the most up-to-date versions of OES, O*NET, BLS and DUA labor market projections, and Census data.

THE LMAT SERIES In the coming months, the Research Division at the Boston Redevelopment Authority will be unveiling a new set of reports using this interactive statistical tool. The LMAT Series will be a collection of reports focusing on the various applications of the program, including general discussions of the skill requirements and wage distributions associated with selected industries and the labor market as a whole. In addition, the LMAT Series will analyze the relationship between occupational requirements and worker attributes in Boston's population.

EXAMPLE 1

COMPARING INDUSTRIAL EDUCATIONAL REQUIREMENTS AND EDUCATIONAL ATTAINMENT OF BOSTON RESIDENTS

Required Education in Selected Industries and Educational Attainment in Boston
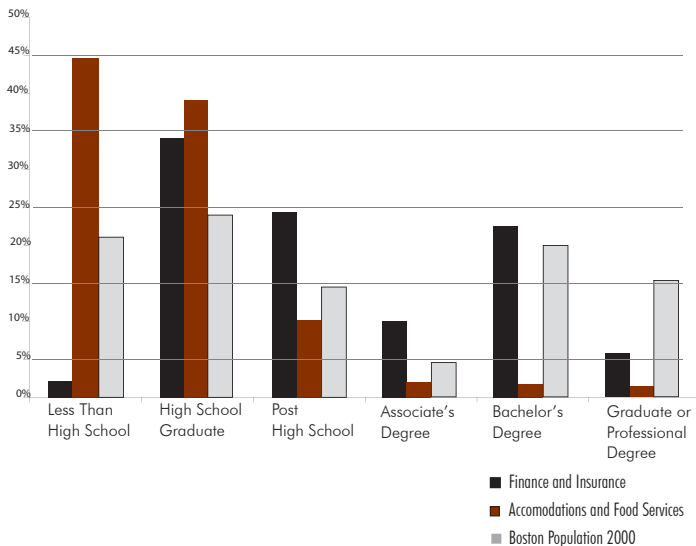
LMAT can plot the educational requirements for industries and compare them with the educational attainment of Boston's population. Here we compare the educational requirements of the Finance and Insurance Industry with that of the Accommodations and Food Services Industry and the actual educational distribution of Boston's labor force. As shown, more than 25% of the jobs in the Finance and Insurance Industry requires at least a Bachelor's Degree, while only about 5% of the jobs in the Accommodations and Food Services Industry require this much education.

EXAMPLE 2

LANGUAGE AND SKILL REQUIREMENTS IN THE LABOR MARKET

Projected Job Growth Between 2004-2014 in Metro Boston by English Language Skill Requirements

Language Skill	Low	Med-Low	Med-High	High
Growth	2%	5.8%	9.5%	14.7%
Average Wage	$12,765	$26,853	$58,013	$69,826

The data above was part of a project the BRA Research Division worked on with the Massachusetts Immigration and Refugee Advocacy Coalition (MIRA). We used LMAT to project job growth between 2004-2014 by language skill requirements for Metro Boston, as well as the expected average wages for new jobs. As these data indicate, the number of new jobs available to individuals with low English language skills is severely limited. In addition, new jobs requiring low language skill tend to be extremely low paying. This suggests that individuals with limited English language skills will have a very difficult time finding employment in occupations that pay an adequate wage.

EXAMPLE 3

COMPARING THE EDUCATIONAL REQUIREMENTS OF DIFFERENT INDUSTRIES

Retail Trade
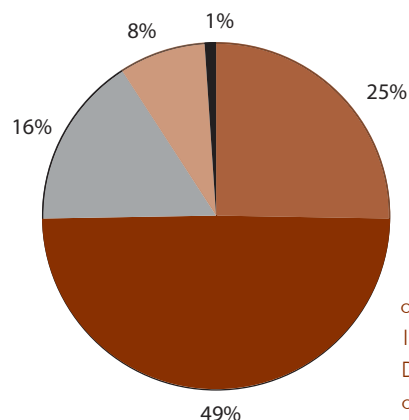
To the left we see that almost three quarters of occupations in the Retail Trade Industry require a High School Diploma or less, whereas 64% of jobs in the Health Care and Social Assistance Industry require at least some college classes.

Health Care & Social Assistance

DATA SOURCES

The Occupational Employment Statistics (OES) is based on a semian-nual mail survey administered as part of a Federal-State cooperative program between the Bureau of Labor Statistics (BLS) and State Workforce Agencies (SWAs). The OES estimates the number of people employed in various industries and their earned wages. The survey consists of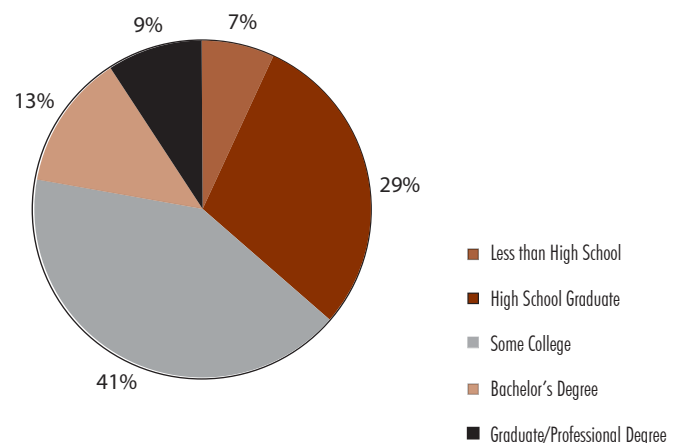 six semiannual panels over a three-year period (conducted in May and November of each year). Each panel includes approximately 200,000 establishments. At the end of the three-year cycle, the OES contacts roughly 1.2 million employers. LMAT uses the May 2005 OES data set.

LMAT uses the OES data sources organized by the NAICS 3, 4, and 5 digit coding system. Each industry is assigned a numeric code in NAICS. The longer the code, the more specific the information is related to that industry. In general, the NAICS 5-digit code data set provides the most specific and narrowed set of job titles associated with a given industry. This is particularly useful when trying to understand the distribution of occupations for a proposed facility in a given industry[1].

OES data provides a full list of the occupational titles associated with each NAICS code, as well as information on the wages and number of people working in those occupations. Occupational titles in OES are categorized by the SOC system---a 6 to 8 digit code assigned to each job title. These codes are typically used to organize occupational data, including the Occupational Information Network (O*NET) and the U.S. Census. More information can be found on OES's website: http://www.bls.gov/oes/.

The Occupational Information Network (O*NET) is a new database that has replaced the Dictionary of Occupational Titles (DOT) as the main source of information on worker attributes and job characteristics associated with specific job titles. O*NET provides both summary and detailed information on more than 800 occupational titles on over 400 scales that measure job characteristics[2]. The O*NET Data Collection Program is an ongoing project. Data are collected on roughly 200 occupational titles per year, with the goal of replenishing the data set every five years. The first cycle of data collection is scheduled for completion in December 2007. This software package utilizes O*NET version 11.0[3].

LMAT uses four main parts of the O*NET database: skills (35 items), knowledge (33 items), educational requirements, and job zone. The data on skills, knowledge, and educational requirements are primarily based on incumbent ratings of job characteristics[4]. For skills and knowledge, respondents are asked a series of questions regarding the level[5] and importance[6] of characteristics related to the job. In terms of educational requirements, incumbents are asked the level of education necessary to perform their job.

Additionally, O*NET classifies occupational titles by job zone. For each occupation, the job zone classification indicates the education, job training, overall experience, examples of other occupations within the same job zone, and Specific Vocational Preparation (SVP) scores[7]. O*NET Online classifies occupations into five different job zones. The lower the job zone number, the less training, education, and previous work experience needed to perform the job.

Bureau of Labor Statistics 2014 Projections
LMAT includes Bureau of Labor Statistics (BLS) bi-annual national employ-ment projections by industry and occupation for the years 2004-2014. These projections can be used to estimate potential shifts in the industrial, occupational, and/or demand-side of the labor market. More information regarding the BLS projections can be found at: http://www.bls.gov/emp/.

Massachusetts Division of Unemployment Assistance 2014 Projections
LMAT also utilizes industry and occupation projections for the Common-wealth for the years 2004-2014. These projections are a combination of information provided by the Massachusetts Division of Unemployment Assistance (DUA) and the Commonwealth's Wages and Employment (ES 202) data. These projections can be used to estimate potential shifts in the industrial and occupational distrubution of the labor market.

Summary File 3 Tables of the 2000 U.S. Census (SF-3)
In order to estimate basic labor force characteristics, LMAT uses the Sum-mary File 3 Tables of the 2000 U.S. Census (SF-3). The SF-3 tables provide a detailed sketch of the key demographic and human capital characteristics for a specifically defined geographic region. These data are available at the Census Tract level. Examples of economic and demographic variables available within the SF-3 tables include: race, gender, nativity status, age, ethnicity, educational attainment, labor force status, and earnings. More information regarding the Census can be found at: http://www.census.gov/main/www/cen2000.html.

END NOTES

1 The NAICS 5-digit code data set does not have information on all possible industries. In those instances, it would be necessary to use either the NAICS 4-digit code or 3-digit code data.

2 Job attribute data are organized by 12 different groupings-skills, tasks, abilities, work activities, work context, job zone, educational requirement, personal interests, work style, work value, related occupations, and wages-measured by a varying number of characteristics.

3 O*NET data are collected in two stages. First, establishments that are expected to employ people in the targeted occupational titles are randomly selected. Next, a random sample of workers in the targeted occupational titles are chosen to answer standardized questionnaires. All workers selected are asked questions related to job tasks and demographics. Beyond that, each worker selected is given one of four surveys related to specifics about the job---either on skills, knowledge, generalized work activities, or work context.

4 Initially, O*NET data consisted of job analysts' ratings on various occupa-tional titles associated with the DOT. Starting in 2001, O*NET began a new data collection program that surveyed actual workers on the various attributes associated with their job.

5 The level questions are scored on a 0-7 scale, where 7 means the job requires high levels of the skill measured and zero means it requires no skill.

6 The importance questions are scored on a 1-5 scale, where 5 indicates that the skill measured is extremely important to the occupation and 1 means it not important at all.

7 SVP is used in the Dictionary of Occupational Titles as a measure of the amount of time need to acquire the necessary skills to work in an occupa-tion. SVP is measured on a 1-9 scale. The higher the number, the more training and education necessary to work in the occupation. The Job Zone classifications on O*NET were developed to transition from SVP scores, as a measures of the experience, education, and job training necessary to work in various occupations.

Understanding the New Normal and Supporting the Unemployed and Underemployed in the Wake of the Great Recession

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National Governors Association Human Services Advisors Policy Institute

Phoenix, Arizona

October 7, 2013

The Great Recession

The Great Recession had a profound long term impact on American workers – including:

> Whether they worked

> How they worked

> How much they make

> How optimistic they are about the labor market

> How they are coping or not coping economically, physically, and mentally

The Changing Realities of Work in America

Mid to Late 20th Century	Early 21st Century
Permanent	Temporary/Contingent
Stable	Volatile
Advancement	Stagnation
Loyalty	Disaffection
One and Done Education	Lifelong Learning
Health Care from Employer	Shared Health Care Responsibility
Defined Benefit Pension	Defined Contribution
"Early" Retirement	"Never" Retire

3

Today's Labor Market Realities Post Great Recession

The immediate and perhaps 'new normal' economic outlook in the U.S. is higher sustained rates and lengths of unemployment and underemployment, continued wage stagnation, and falling workforce participation (even among individuals with higher skill and education levels).

4

The U.S. Labor Market Today

- **Unemployment is elevated.** Despite 42 consecutive months of gains in private sector employment, the <u>unemployment rate is still at 7.3 percent or 11.3 million Americans out of work</u>; in December 2007 it was only 4.6 percent. The current unemployment rate is higher now than in 2007 across all ages, education, occupation, gender and ethnic groups.

- **The old are working, but not the young. However, when older workers lose their jobs, they are out of work longer.** While unemployment is high for teenagers (25%) and lower for older workers (5.6%), the average duration of unemployment for older people is about 53 weeks compared with 19 weeks for teenagers.

- **Labor force participation is depressed.** About <u>4 million workers have left the labor force</u>, driving labor force participation rates to a historic low

5

The U.S. Labor Market Today

- **Underemployment is elevated.** Hiring and quit rates remain significantly below their pre-recession peaks. Although the share of the long term unemployed has fallen from its peak of 45% in 2011 to 38% today, it is still far above its 2001-2007 average. <u>About 8 million people are working part-time for 'economic reasons'</u> (meaning they would like to work full time but can't)

- **Long term unemployment has doubled since 2007.** The share of unemployed workers who have been unemployed for more than 6 months has remained steady at 37% far above normal (in 2007 the share averaged 17.5% - more than double as of August 2013). <u>About 4.3 million people are among today's long term unemployed</u>.

6

The U.S. Job Market is Still Weak

- **Weak job gains in middle income jobs.** During the recession, employment declined across the board, but 60% of the net job losses occurred in middle-income occupations with median hourly wages of $13.84 to $21.13. These occupations have accounted for less than a quarter of the net job gains since the recession.

- **Most of the job growth has been in low wage work.** During the recovery, low wage occupations with median hourly wages of $7.69 to $13.83 have accounted for more than half of all job growth.

- **Disproportionate job growth in low wage industries**. Over the last year, more than 40% of job growth has been in lower-paying sectors (e.g., retail, leisure/hospitality) and temporary help agencies.

- **Job growth is predominantly part time not full time.** Many of the job growth has been in part time and contingent work, with weak public and private sector hiring in full time positions

7

Wage Stagnation and Inequality Exist for Most Americans

- **Wage growth is depressed.** The prolonged sluggish labor market has resulted in <u>falling wages and decreased household income for the majority of Americans</u>

- **Wage growth has been disproportionate.**
  - Between 2007 and 2012 average real hourly wages for all private sector workers grew by only 1.2 percent but there are differences among workers
  - By mid-2013, real wages began to increase for workers between the 50th and 70th percentile but continue to fall for workers below
  - Over the period 2000-2012, real hourly wages were flat or declining for the bottom 60% of the wage distribution (despite productivity growth of nearly 25% during that same period)
  - 95% of wage gains since 2009 have gone to the top 1% of the wage distribution, with 60% of gains to the top 0.1% (people with annual incomes of more than $1.9 million)

8

Some of the Causes

- A drop in the real value of the minimum wage

- The union membership rate for U.S. workers is at a new low. In 2012, the union membership rate was 11.3%, down from an historic high of 35% in the 1950s.

- The talent bar for success in the labor market is rising – meaning more emphasis on education and credential attainment and higher educational requirements for a job

- Globalization and technological changes have played major roles and been driving forces in today's economy.

The Voice of American Workers:
During the Great Recession, Most Americans Experienced Unemployment — Directly or Indirectly

10
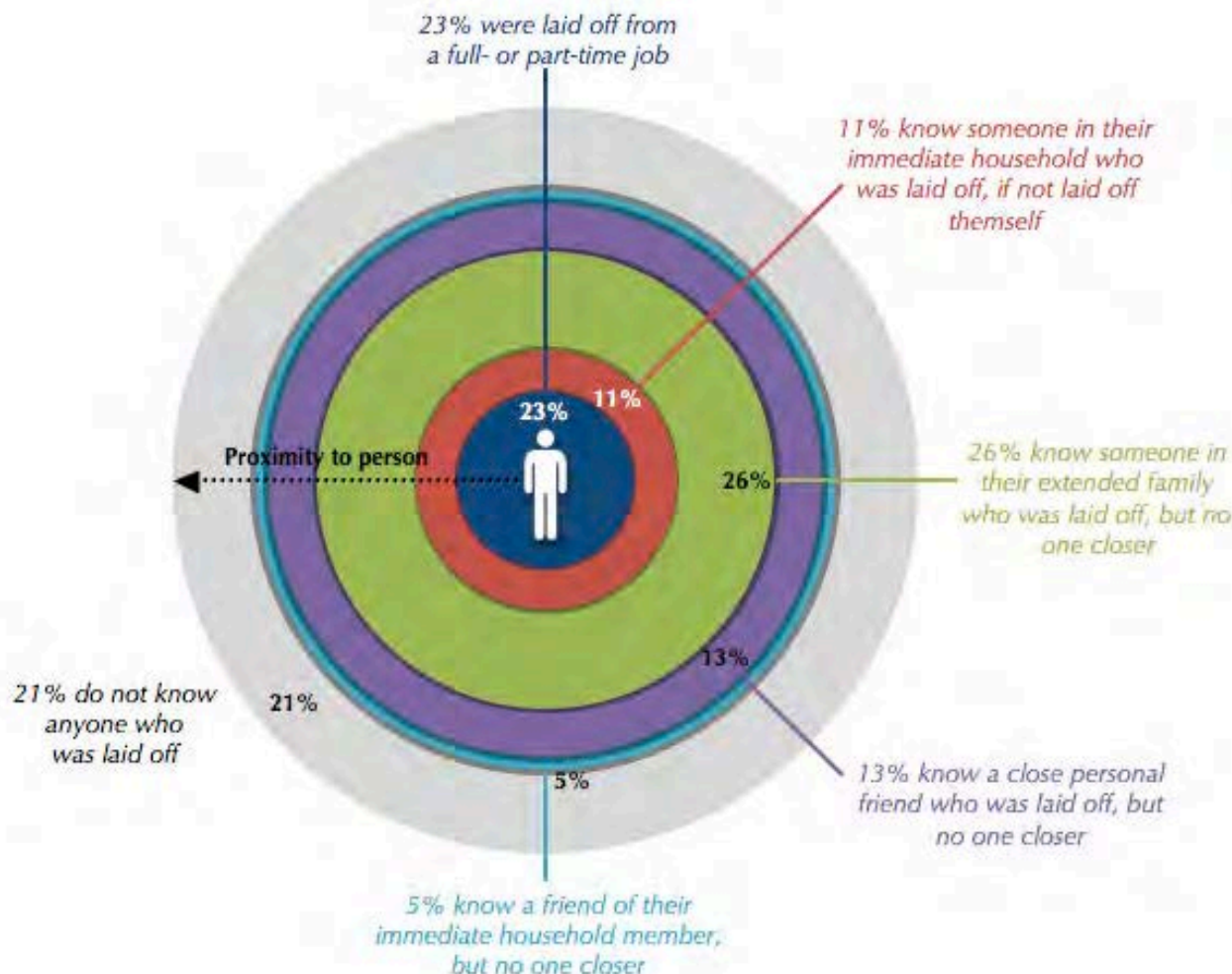
Most American Workers Have Not Recovered from the Great Recession
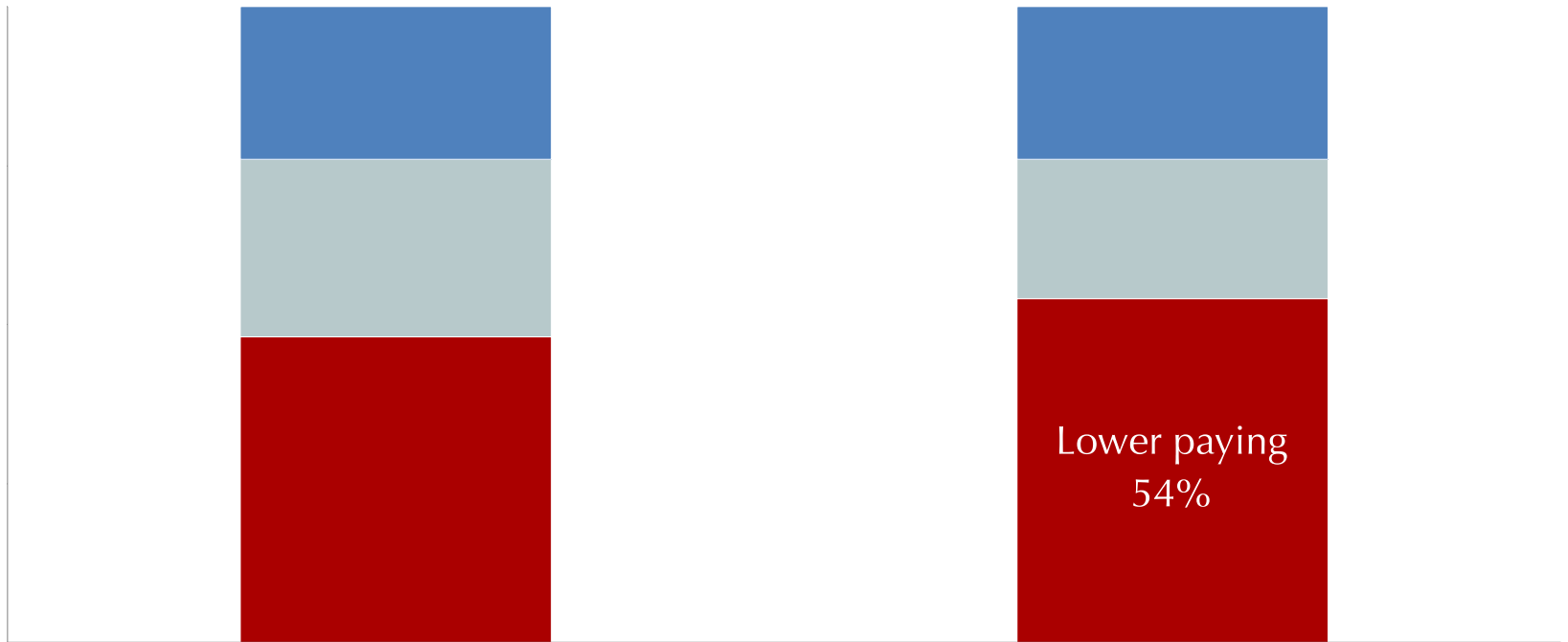
Lower paying
54%

the recession,
is your job higher, lower, or similar paying?

Most American Workers Think that the Changes are Permanent

Do you think the Great Recession has left us with:		
	Jan. 2013	**Aug. 2010**
A **permanent** change in what are normal economic conditions in the nation	60%	56%
A **temporary** change that the economy will recover from	41%	43%

Just 19% agree that overall, job, career, and employment opportunities will be better for the next generation

12

Most American Workers are Pessimistic About the Future of the U.S. Labor Market

Ratio of Bad to Good		Will Come Back Soon	Will Never Come Back
6.4 to 1	The ability of young people to afford college	9%	58%
3.3 to 1	Workers feeling secure in their jobs	13%	43%
3.2 to 1	Workers having to take jobs below their skill level	13%	42%
2.8 to 1	The elderly having to find part-time work after retiring	17%	47%
2.1 to 1	The availability of good jobs at good pay for those who want to work	14%	34%
1.9 to 1	A lower unemployment rate	15%	29%

13

Under- and Unemployed Workers Endure Personal and Psychological Problems, which Undermines their Employability

- Seventy-five percent said their job loss had a **major impact** on them and their family.

- A majority of America's unemployed workers told us that they are depressed, anxious, and feel helpless, angry, and hopeless. And their stress is manifested in damage to the quality of life.

- Americans report negative impacts on their health—restlessness, sleep deprivation, family strains, hostility to others, substance dependency, and social withdrawal from friends, former colleagues, and family.

(Source: Heldrich Center, Work Trends: Out of Work and Losing Hope, 2011)

14

Employed and Unemployed Workers Forced to Make Tough Choices During Recession

ement to make ends meet

8%

% Saying "Yes"

15
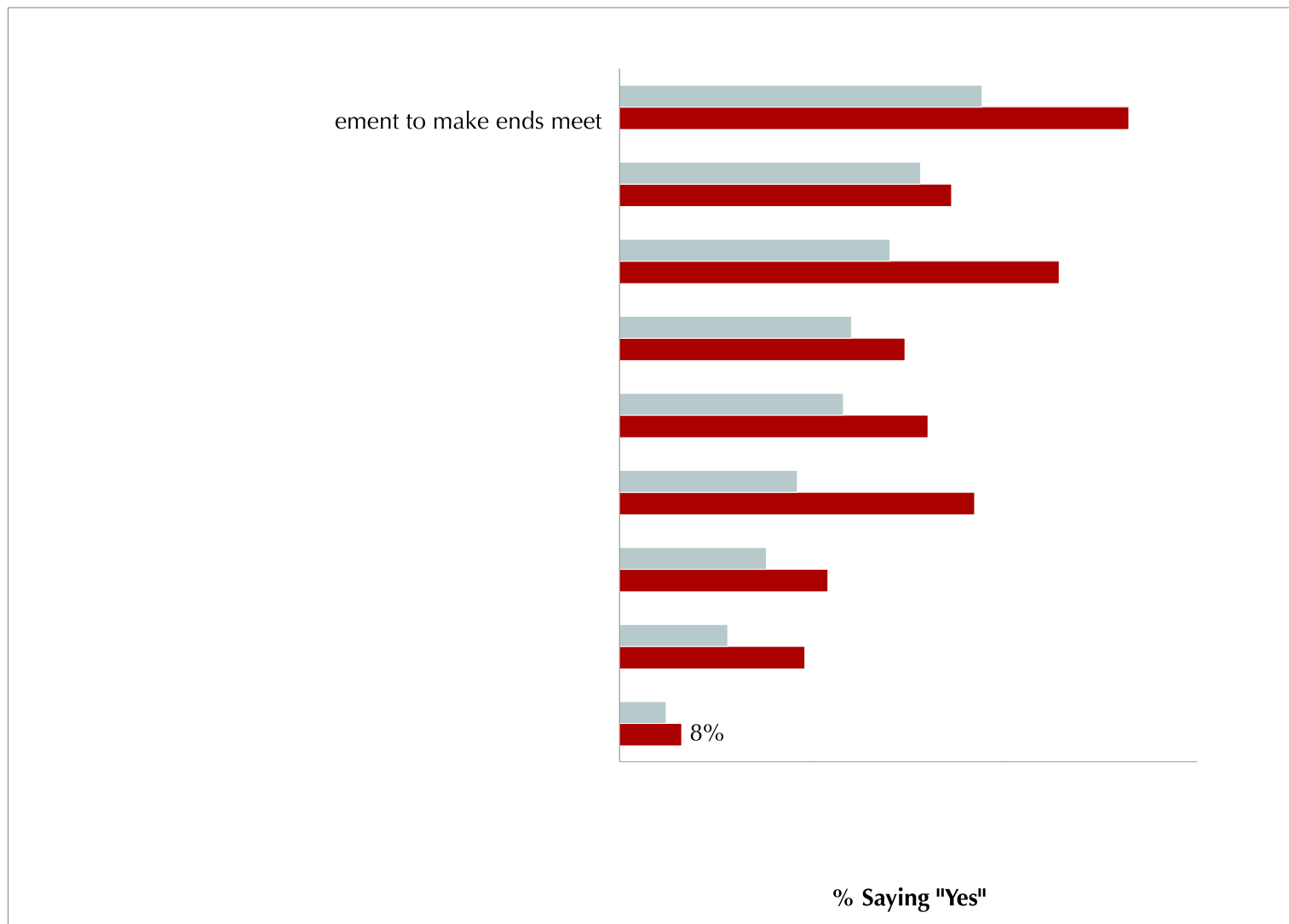
The Result

Anxious and scared American workers losing ground, losing trust in institutions such as government and businesses, and losing confidence that they can achieve the American dream

How Did Our U.S. Institutions and Policies Fare?

- The Great Recession laid bare the ways in which U.S. policies do not work well for a 21st century economy and a 21st century labor market

- It created an unprecedented test of workforce and 'to work' program policies under existing federal programs such as WIA and TANF– demonstrating the limits of policies and programs *based on a booming economy*

- It put a strain on federal safety net programs such as SNAP. Spending on SNAP benefits grew by 135% between 2007 and 2011 driven by the weak economy and the number of people applying for benefits

17

- It exposed the limits and inequities within our existing federal human services and workforce policies and programs, and the weaknesses in current workforce and education policies, programs and operations

- It strained integration efforts between workforce and human service agencies (but offered opportunities) and exacerbated the programmatic and funding silos between federal and state workforce, education and human services programs operating at the state level

- In short, today's workforce investment policies are ill suited to the needs of the long term unemployed, including individuals with long absences from employment (such as ex-offenders, individuals with disabilities, displaced homemakers, etc.)

18

"Government strategies for reducing unemployment are as numerous as the causes of the problem…Government sponsored training measures tackle an enormously difficult task. In simple terms they seek to transform chronically unemployed people into stead, productive workers. Most of the people served by the current job training system have not been successful in school, have only limited skills, and may exhibit personal characteristics that make them unattractive to employers. Their joblessness may be just one manifestation of a broad and deeply rooted set of problems"

Donald Baumer and Carl Van Horn, *The Politics of Unemployment*

19

- In the post-recession world, there are many more highly qualified and highly skilled individuals who have lost jobs than in the past. Their expectations of government services may be different from traditional human service customers but their needs are much the same

- Yet, the U.S. Government's basic policy and program 'tools' for addressing unemployment have remained essentially unchanged for 60 years

- The consequences of maintaining outdated and outmoded policies, practices and siloed systems and programs is detrimental to the underemployed and unemployed

- Better coordination between human service agencies and workforce agencies would help

20

Addressing the Problem

- **Future policies and practices should be based on a value of 'doing no harm'**

  Policies and practices should be adjusted today and implemented tomorrow based on existing credible <u>evidence</u> about what works. There still exists a lack of real data and evidence in the employment field; therefore, we currently do not know enough today to make the wisest policy and practice decisions. Politics, protectionism and personal preferences too often fill the void today and drive policy and funding decisions and, as such, essentially 'do harm'.

- **Future employment policies need to be designed to be durable and effective in good economic times <u>and</u> bad**

  It is critically important that future public employment policies and programs be developed within the context that they must operate in both a bust <u>and </u>a boom economy.

21

- **Policies need to balance between protecting vulnerable individuals in the short run without continuing to support and/or exacerbate long term dependence on public benefits (UI, SSDI, TANF, etc)**
  Policies must also be guided by a principal of mutual responsibility (between the public and the individual) toward a longer term goal of employment and economic self sufficiency.

- **Finally, policies also need to recognize that in order for many individuals who have been out of the labor market to work, they must have access to affordable supports both in and out of the workplace in addition to life long educational and/or skill training opportunities (especially necessary in today's new economy)**
  Policies need to recognize that all out of work individuals and those in lower wage employment are likely to need access to supports (in the short and long term) which may be more cost effective to provide than long term income public benefits.

22

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VENDOR PRODUCT REVIEW

A CONSUMER'S GUIDE TO REAL-TIME LABOR MARKET INFORMATION

BY JOHN DORRER AND MYRIAM MILFORT   APRIL 2012

JOBS FOR THE FUTURE

Jobs for the Future identifies, develops, and promotes education and workforce strategies that expand opportunity for youth and adults who are struggling to advance in America today. In more than 200 communities across 43 states, JFF improves the pathways leading from high school to college to family-sustaining careers.

CREDENTIALS THAT WORK
Occupational Training for Today's Jobs

Credentials that Work is a JFF initiative that seeks to utilize innovations in the collection and use of real-time labor market information to better align investments in education and training with the needs of the economy. Stronger alignment will ensure that education credentials have high value for both workers and employers.

ACKNOWLEDGMENTS

ABOUT THE AUTHOR

John Dorrer is a program director in JFF's Building Economic Opportunity Group, which focuses on advancing the education and careers of low-skilled adults and low-wage workers. He leads JFF's emerging work in the development and application of labor market information and workforce research, including helping states use longitudinal data to align their education and training investments with the needs of dynamic regional economies. Mr. Dorrer has 30 years of experience in workforce development. An economist and research administrator, his work has focused on workforce development, human capital, and labor market policies at the state and local levels. He came to JFF from the Maine Department of Labor, where he served as acting commissioner and as director of the Center for Workforce Research and Information for eight years.

Myriam Milfort is a senior project manager in JFF's Building Economic Opportunity Group, where she manages *Credentials that Work*, JFF's emerging work in the development and application of labor market information and workforce research. Before joining JFF, Ms. Milfort served as a Presidential Management Fellow for two offices within the U.S. Department of Labor, where she managed LMI grants for 10 states and oversaw key convenings of state and federal LMI stakeholders. Ms. Milfort previously worked at the Federal Reserve Bank of Boston and J.P. Morgan Chase & Co.

iii

TABLE OF CONTENTS

INTRODUCTION

In recent years, a small number of private, for-profit software companies have developed real-time labor market information tools to transform job postings data into analytics. These firms are aggregating and coding data from job postings based on the North American Industry Classification System (NAICS) and the Standard Occupational Classification (SOC) codes developed by the Bureau of Labor Statistics and the Occupational Information Network (O*NET). They are licensing their data to state and local governments, workforce boards, educational institutions, and economic development and research organizations to enhance the understanding of local labor market conditions.

Jobs for the Future is deeply committed to developing career pathways and guiding individuals to opportunities for advancement in the labor market. Key to that mission is sound information and informed choice. *Credentials that Work*, an initiative led by JFF, uses innovations in real-time labor market data to help institutions better align education and training investments and program and course development with the needs of regional economies. Real-time data can help improve the understanding of hiring trends and employer demand, including certifications and skill requirements, by drawing on current information and consistent signals from the labor market.

As JFF explored real-time LMI tools and systems, it became clear that critical information about them, and the data that supported them, lacked transparency. Unlike most traditional sources of labor market information provided by government agencies, which must disclose their methodologies and data sources, real-time LMI is the byproduct of Internet-based transactions and produced by private vendors operating in competitive markets. This presents a challenge because users of any data source should be aware of the method used to gather the data, the strengths and limitations associated with them, and the assumptions that go into producing reports and analyses. Furthermore, real-time LMI systems lack the details users need to have full confidence, and these systems have not been independently evaluated. For these reasons, JFF reviewed the products of multiple vendors of real-time LMI to assist individuals and institutions considering the adoption of this innovative technology.

To help us evaluate the utility of real-time job postings and analytics gathered for end users, *Credentials that Work* examined the products of several real-time LMI firms. These firms create and market products to human resources staff, public workforce agencies, educational institutions, economic developers, One-Stop Career Centers, and individuals. *Aligning Community Colleges to Their Local Labor Markets*, a study commissioned by *Credentials that Work*, identified seven firms (Altstadt 2011). With the study as a starting point, we focused on six vendors, all of which have extraction, analysis, and de-duplication capabilities. To have an accurate picture

of online postings, the firms included in this report employ complex algorithms to identify and remove duplicate online job postings. Without this ability, labor demand based on real-time LMI would be greatly inflated. This report evaluates:

> Burning Glass Technologies (EmployOn/Labor Insight);

> Wanted Technologies/Wanted Analytics;

> Geographic Solutions;

> Conference Board/Help Wanted Online (HWOL);

> Career Builder/Supply-Demand Portal; and

> Monster Government Solutions/Labor Market Analytics.

The data for this brief were gathered using a 42-question, open-response survey. The survey focused on three key areas:

> Products and services;

> Product costs and licensing; and

> Methodological approach and data-quality procedures.

BACKGROUND

S tudents, jobseekers, education and training providers, workforce development programs, and employers must assess the performance of labor markets and research employment prospects in order to effectively guide their investments and decisions. Accurate, timely, and reliable information about labor market and employment prospects matters. Despite projections for the U.S. economy to improve for the rest of this year, workers and jobseekers will continue to face formidable market challenges.

An individual's ability to succeed in the labor market is largely driven by the level of education he or she attains. Education is the key to improving one's economic status, and it provides greater insulation from unemployment in times of economic turbulence. For instance, in December 2011, the unemployment rate for workers with less than a high school diploma was 13.8 percent compared to 7.7 percent for workers with some college or an Associate's degree.[1]

Not only is getting a postsecondary degree or credential important, but area of study also matters. For example, according to Georgetown University's Center on Workforce and Education, the average lifetime earnings for a computer programmer with an Associate's degree are $2.7 million, while an elementary or middle school teacher with a Bachelor's degree will make only $1.8 million (Carnevale, Rose, & Ban 2011). These significant statistical indicators provide an important resource that can help students, parents, and educators align education and training decisions with the needs of the regional economy.

While the availability and quality of labor market information has greatly improved over the years, there remain significant limitations in the availability of timely information about employment opportunities and what jobseekers need to prepare for them. The emergence of real-time labor market information is among the most significant innovations and breakthroughs for assessing labor market performance and interpreting employment needs and requirements. Real-time LMI is labor market intelligence derived from the analysis of job postings and resumes placed into public and private labor exchanges. It is "real time" because it can be pulled from the Internet daily. It is labor market intelligence because it can include supply and demand trends, emerging occupations, current and emerging skill requirements, and market demand for education and certifications (Vollman 2010).

SUMMARY OF SURVEY FINDINGS

PRODUCTS AND SERVICES

> Respondents provide a wide range of products and services for human resources professionals, public workforce agencies, educational institutions, economic developers, One-Stops, and individuals.

> Respondents spider a variety of websites, including: corporate sites; newspapers; public and private job boards; and occupation-specific jobs boards.

> Products and services cover a wide geographic scope, including city, county, Metropolitan Statistical Areas, and state-level data.

> A small number of real-time LMI firms began collecting job-posting data in 2005. The date range for available data varies by company; analytical data are available between 2005 and 2012.

PRODUCT COST AND LICENSING

> Real-time LMI technologies are typically available for a fee. Licensing fees vary by product, ranging from $5,000 to $10,000 for a single-user, one-year license.

METHODOLOGICAL APPROACH AND DATA-QUALITY PROCEDURES

> Real-time LMI vendors spider up to 20,000 sites daily.

> Real-time LMI tools parse up to 4 million job postings daily.

> Several firms are investigating or provide "supply side" labor market analyses through the collection of resumes.

> Firms use both automated and manual procedures to scrape and spider job boards, to code various data elements, and for parsing and job matching.

> Real-time LMI technologies employ procedures to de-duplicate 60 to 90 percent of jobs ads collected. The rate of de-duplication varies by company.

> All firms surveyed or researched employ complex algorithms to increase integrity and reliability of data provided for analysis and decision making.

> The firms employ complex parsing, coding, and data-extraction procedures. Proper coding is one of the most critical aspects of turning job ads into analytical reports.

THE SURVEY FINDINGS

Burning Glass Technologies and Geographic Solutions responded to JFF's survey. Wanted Technologies chose not to participate, citing confidentiality. For Conference Board/Help Wanted Online, JFF gathered most of the requisite information from published technical notes provided on the web.[2] (The Conference Board is a user of the Wanted Technologies Internet job postings data.) Career Builder did not complete the survey; instead, in August 2011, it responded to several survey questions via a conference call. JFF also learned through its research that Wanted Technologies provides the real-time LMI data for Career Builder's Supply and Demand Portal, Monster's Real Time Labor Market Intelligence, and the Conference Board's Help-Wanted Online Data Series.[3]

Products and Services

JFF asked seven questions about products and services in order to identify consumer, analytical, and human resources capabilities. Survey questions asked respondents to identify and categorize products and services by user group. *(See the appendix for survey questions.)* We classified real-time LMI technologies into two categories, primary and derivative products or services. Table 1 lists primary real-time LMI products and services.

TABLE 1.
PRIMARY REAL-TIME PRODUCTS AND SERVICES

REAL-TIME FIRM	REAL-TIME PRODUCTS	DATA COLLECTION TIMEFRAME	ACCESS AND COVERAGE
Wanted Technologies	Wanted Analytics 3.0	2005-12	Access to 2,500 records for a single user: $7,140 per year Content available to consumer determined by cost
Geographic Solutions	VOS Jobs America's Labor Market Analyzer (ALMA)	2005-12	Annual subscription, single-seat license Full access to current and historical data; $7,999 per year
Burning Glass Technologies	Labor Insight Focus Career	2007-12	Full underlying content Cost determined by number of users or product

Derivative designations are reserved for real-time LMI products or services created using data from an external source. Table 2 lists the most common derivative products or services.

TABLE 2.
DERIVATIVE REAL-TIME PRODUCTS AND SERVICES

FIRM NAME	DERIVATIVE PRODUCT/ SERVICE	PRIMARY DATA AGGREGATOR	PRODUCT/SERVICE DESCRIPTION
Career Builder	Supply and Demand Portal	Wanted Technologies	Career builder developed the Supply and Demand Portal by combining its resume data (supply) to Wanted Analytics aggregated job postings database (demand).
Conference Board	Help Wanted Online data series	Wanted Technologies	A business tool that measures the number of new, first-time online jobs and jobs reposted from the previous month
Monster Government Solutions	Monster Real Time Labor Intelligence	Wanted Technologies	Subscription service; consumers can purchase annual or quarterly supply (Monster resumes) and demand-side (Wanted job postings data) reports or aggregate data.

Note that several public workforce agencies and One-Stop Career Centers have created custom derivative products and services for their stakeholders using data from vendors listed in Table 1. These products will be highlighted in an upcoming brief.

Product Costs and Licensing

The vendors surveyed or researched make their products and services available on a subscription basis, with customers paying a monthly or annual fee. In JFF's assessment of the market, we found that these subscription costs are often negotiable; community colleges, workforce boards, and other customers may want to negotiate group rates rather than single-use agreements. The fees for products and services can be found on the company websites; however, fees for custom research or data are not posted. the cost of a one-year license may range from $5,000 to $10,000, depending on the number of users or data-access level.

Methodological Approach and Data-quality Procedures

Drawing actionable data from real-time job postings is a complex undertaking; duplication of job openings occurs frequently and is not always easily detected. Moreover, data-quality procedures for many of the real-time LMI firms are confidential. However, all firms surveyed or researched indicate rigorous quality and integrity procedures that include a daily review of errors, postings, and duplications. At a minimum, all firms provide information that is geographically comprehensive and coded to the industry and occupation level. All firms have developed proprietary intelligence to capture, analyze, de-duplicate, and code job postings.

Each firm also maintains discrete procedures regarding the frequency of data updates, percent of ads de-duplicated, and the number and types of sites spidered. As a result of efforts to improve the integrity and quality of their data, both Wanted Technologies and Burning Glass Technologies have improved their de-duplication processes.

To transform job postings data into actionable real-time LMI, data aggregators all adopt the following procedures:

> Use of proprietary technology to spider or search for job postings from a variety of job search engines. While the types of site searched vary by company, common ones include newspapers, job boards, social media sites (e.g., LinkedIn), corporate sites, and government job boards.

> Selection of data elements to code (e.g., based on the job posting, assigning at a minimum geographic, industry, and occupation codes).

> Employ de-duplication procedures to get a more accurate count of job postings.

> Code select data elements (e.g., geography, industry/NAICS, occupation/SOC) in order to transform job-posting data into analytics.

Table 3 provides a firm-specific summary of methodological approach.

TABLE 3.
METHODOLOGICAL APPROACH OF REAL-TIME LMI PROVIDERS

	NUMBER OF SITES SPIDERED	TYPES OF SITES SPIDERED	CODED DATA ELEMENTS	DE-DUPLICATION	DATA UPDATE FREQUENCY
Burning Glass Technologies	17,000+	> Newspaper ads > Internet job boards > Corporate sites (small, mid-size, large)	> Geographic > Employer > Industry > Occupation > Job title > Skills > Certifications > Education > Experience > Job type > Salary > # of Positions BG codes at least 70 data elements	> >80% de-duplication > Automated & manual processes	Daily
Geographic Solutions	16,000–17,000	> Newspaper ads > Public and private job boards > Government and military sites > Education institutions > Hospital sites > Volunteer sites > Recruiter sites > Occupation specific boards > Chambers of commerce > Corporate sites	48 elements including: > Geography > Industry > Occupation > Geography > Education > Experience > Employer > Wage > Job type > Certifications > Skills	> Automated and manual processes > Percent de-duplicated not provided	Daily
Wanted Technologies	1,200+	> Newspaper ads > Internet job boards	> Geography > Industry > Occupation > Job title > Skills	> 79% de-duplicated (Reduces jobs collected from 14 million to 3 million)	Daily

The term "data-quality procedures" in this report refers to de-duplication, parsing, and job spidering. All firms were hesitant to share actual data integrity procedures but did indicate these procedures exist and are considered business confidential.

RECOMMENDATIONS

I n recent years, educators and workforce development practitioners have shown increased interest in making data-driven decisions. To that end, several firms have created tools and systems that collect and analyze new types of data, including data on job postings. These new data sets are an important input to help guide organizations as they make a wide range of decisions that can ultimately improve student success—including decisions around curricula, strategic planning, and student counseling.

Selecting the right real-time LMI technology or system for an organization is a complex decision. JFF recommends that potential clients take several steps before adopting any real-time LMI technology or system:

Investigate the purchase as a collaborative effort with a consortium or with a network. Collaboration can affect the price of the tool, lead to a focused application of knowledge and expertise, make more effective use of resources, lead to a higher level commitment to action, and help increase the adoption within each organization.

Consider all available real-time LMI tools and systems. No one tool fits all users. Examine organizational needs before making any purchase to determine the right tool—one that leads to better outcomes and choices for students.

Recognize that real-time LMI is a complement to, not a replacement for, traditional labor market information. The availability of real-time LMI is a recent development, and its use in the context of occupational training programs is just emerging. And while real-time LMI is an important innovation in itself, it is a limited input. As part of *Credentials that Work*, JFF encourages institutions to consider a mix of data sources, including the many traditional labor market information data series (e.g., occupational projections).

Discuss plans with early implementers, including your local and state LMI entities. Many state LMI entities draw on real-time LMI technologies to complement the traditional data they produce. Before a state decides to adopt this emerging technology widely, JFF recommends examining how state LMI entities currently capture and implement real-time LMI data.

Validate information received from real-time LMI tools. JFF encourages users to maintain a healthy degree of skepticism and take a close look at individual job postings available to get a more detailed look at the nature of jobs. The use of real-time LMI analytics is growing, and vendors have made significant improvements in their spidering and parsing processes. However, outputs are generally only as good as inputs; we recommend validating all real-time data.

SURVEY QUESTIONS

The data for this brief were gathered using this 42-question, open-response survey. The survey was emailed, with follow-up telephone interviews.

BASIC INFORMATION ABOUT YOUR BUSINESS

Describe your firm's mission and purpose.

What are your key business activities/products?

How long has your business been active (months/years)?

How many people does your business employ?

What are your estimated annual revenues/sales?

PRODUCTS AND SERVICES

What are your primary products and services?

Do you provide consumer services? List all consumer services provided. (Consumer services include but are not limited to job banks, resume matching, and job search tools.)

Do you provide analytical services? List all analytical services provided. (Analytical services include but are not limited to labor market information, economic and demographic analysis, and industry and occupational analysis.)

Do you provide human resources services? List all HR services provided. (HR services include but are not limited job/candidate matching, resume parsing, and workforce analytics.)

What is the geographic scope (state, regional, local)?

Please estimate the percentage of your products/services that are provided in the following categories:

> Consumer Services: _____ %

> Analytical Services: _____ %

> HR Services: _____ %

> Workforce Analytics: _____ %

Please estimate the percentage of your customers by category:

> Businesses and Employers:_____ %

> Economic Developers: _____ %

> Educators: _____ %

> Job Boards: _____ %

> Labor Market Analysts: _____ %

> Recruitment Agencies: _____ %

> State Unemployment Insurance Agencies: _____ %

> Workforce Agencies: _____ %

PRODUCT LICENSING STRUCTURE

Do your products require a license?

Do you have any products that do not require a license? If yes, please list:

Please discuss or provide the scope of your licenses. Are they exclusive/nonexclusive; transferable/nontransferable; limitations/restrictions on use; updates, enhancements releases.

Are product subscriptions available?

Are seat licenses available?

Please list licenses by type (data, software).

Discuss the licensee's obligation.

Are there training costs associated with a license purchase?

Provide your products' terms & terminations:

> Discuss renewal terms.

> Discuss product warranties (quality of service, software performance).

What are the product/license costs?

> Provide payment form, amount, and schedule

> What is included?

> Are license fees separate from service fees?

TECHNOLOGICAL/METHODOLOGICAL APPROACH

Do you use scraping methodologies?

Do you use spidering methodologies?

How many spidering sites do you use?

What is the average number of postings (weekly, monthly, annually)?

What is your frequency of spidering (weekly, monthly, annually)?

Estimate the percentage of sites that are included in the spidering by type:

> Corporate: _____ %

> Newspaper: _____ %

> Public Job Boards (federal, state, local): _____ %

> Private Job Boards: _____ %

> Regional Job Boards: _____ %

> Occupation Specific Job Boards: _____ %

> Other: _____ %

Describe your technological approach.

Describe your approach with the following:

> Data Coding

> Parsing

> Job Matching

DATA QUALITY

Describe or provide your policies and procedures around data quality and integrity.

Describe or provide your quality control procedures. (Include total number of ads reviewed, acceptable error rates, etc.)

Have you experienced data quality issues? Please describe.

How do you eliminate duplicate job postings?

How do you assign industry and occupational codes?

Describe your geographic assignment procedures.

Describe or provide your job posting (ads) retention policies. (How long do you retain ads? How do you determine new/old ads? What are your timeframes for categorizing ads?)

Describe or provide your text interpretation/coding policies and procedures.

> How do you code job titles, tasks, and requirements in ads?

Describe or provide your editing policies and procedures.

Do you compare raw posts to parsed?

Generally describe your current and future plans for addressing data issues.

ENDNOTES

[1] See: http://www.bls.gov/web/empsit/cpseea05.pdf

[2] See: http://www.conference-board.org/data/helpwantedonline.cfm

[3] See: http://www.worldbusinesschicago.com/node/843

[4] This research came from many sources: discussions with John Dorrer but not directly from survey responses; the link above provides a reference that was published; and HWOL technical notes.

[5] See: http://www.unleashthemonster.net/wp-content/uploads/RLI-Ovw-2010.pdf

[6] See: http://www.conference-board.org/data/helpwantedonline.cfm

15

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INNOVATIONS IN LABOR MARKET INFORMATION AND THEIR APPLICATION

APPLICATIONS FOR WORKFORCE PROGRAMS

AUGUST 2012

A GREENWAYS ACTION BRIEF

By Myriam Milfort and Jeremy Kelley

Green Ways

A **JOBS FOR THE FUTURE** INITIATIVE

CREDENTIALS THAT WORK
Occupational Training for Today's Jobs

CREDENTIALS THAT WORK
Occupational Training for Today's Jobs

Credentials that Work is a JFF initiative that seeks to utilize innovations in the collection and use of real-time labor market information to better align investments in education and training with the needs of the economy. Stronger alignment will ensure that education credentials have high value for both workers and employers. This work is funded by Lumina Foundation for Education and the Joyce Foundation.

Green Ways
A JOBS FOR THE FUTURE INITIATIVE

The **GreenWays** initiative provides high-quality workforce services to employers and to workers seeking to advance their careers in the green economy. The initiative invests in 20 workforce partnerships across six diverse industry sectors in eight metropolitan labor markets. It builds on JFF's approach of organizing employers and workforce resources into sectoral workforce partnerships to promote career advancement for lower-skilled workers. GreenWays is supported by grants from the U.S. Department of Labor through Pathways Out of Poverty and the Green Jobs Innovation Fund.

GREENWAYS.JFF.ORG

JOBS FOR THE FUTURE

Jobs for the Future aligns education with today's high-demand careers. With its partners, JFF develops policy solutions and new pathways leading from college readiness to career advancement for struggling and low-income populations in America.

WWW.JFF.ORG

ABOUT THE AUTHOR

Myriam Milfort is a senior project manager in JFF's Building Economic Opportunity Group, where she manages Credentials that Work, JFF's work in the development and application of labor market information and workforce research. Before joining JFF, Ms. Milfort served as a Presidential Management Fellow for two offices within the U.S. Department of Labor where she managed LMI grants for 10 states and oversaw key convenings of state and federal LMI stakeholders. Ms. Milfort previously worked at the Federal Reserve Bank of Boston and J.P. Morgan Chase & Co.

Jeremy Kelley is a project manager in JFF's Building Economic Opportunity Group. He coordinates the Adult Completion Policy Project, a JFF policy initiative in Kentucky, Michigan, and North Carolina that seeks to increase occupational program enrollment and completion for adults who previously earned college credit but did not achieve a degree. This work is part of JFF's participation in Lumina Foundation for Education's adult degree completion strategy. He also conducts research and delivers presentations for Credentials that Work and workforce research supported by the Lumina and the Joyce foundations. Before coming to JFF, Mr. Kelley was a project coordinator for the Suffolk County District Attorney's Safe Neighborhood Initiative.

ACKNOWLEDGMENTS

TABLE OF CONTENTS

PREFACE

With funding from the Joyce and Lumina foundations, Jobs for the Future launched Credentials that Work to help postsecondary institutions, regions, and states align their occupational training programs to changing market demands. This initiative incorporates innovations in real-time labor market information in guiding institutions to better align education and training investments with the needs of regional economies. Real-time data draw on current information and signals from the labor market to help improve the understanding of hiring trends and employer demand, including certifications and skill requirements. Through Credentials that Work, JFF and participating community colleges seek to advance the use of a combination of traditional and real-time LMI in institutional decision making.

This action brief draws on "Innovations in Labor Market Information and Their Application," a workshop presented at the GreenWays to Good Jobs Peer Learning Conference, Milwaukee, Wisconsin, February 29, 2012. It provides an overview of Credentials that Work and demonstrates the application of real-time LMI by workforce partnerships supported by GreenWays. Reflecting the green jobs backdrop of the conference, examples and suggestions indicate how job developers can use LMI resources to acquire a more robust understanding of their local green economies.

INTRODUCTION

Education and training institutions face the formidable challenge of preparing students and workers with the knowledge and skills needed to compete in a global economy. As the U.S. economy slowly recovers, the development of an educated workforce remains one of the most pressing issues today. A 2010 study, *Help Wanted: Projecting Jobs and Education Requirements Through 2018*, predicts that U.S. employers will need 22 million new workers with postsecondary degrees by 2018.[1] The report also predicts a shortfall of three million workers or 300,000 college graduates every year over the same period.

Meanwhile, structural economic issues—particularly the disconnect between the skills workers possess and those that employers need—remain a topic of discussion for policymakers, education and training providers, and other stakeholders in the American workforce. The McKinsey Global Institute reports that without prompt action, by 2020 there could be 85 million too few people with high and medium skills but 90 million too many low-skilled workers.[2]

This brief explores how real-time and traditional labor market information can help workforce development providers prepare workers for and connect them to occupations in high-demand industries. It begins by defining these two types of LMI as well as highlighting the benefits and constraints of the real-time data. The brief then presents three ways that program directors and job developers in job training programs can use real-time LMI to improve outcomes: improving the quality of employer engagement by framing and focusing discussion; gauging demand for specific occupations and skills to match program designs with labor market needs; and exploring skills transferability from job training to a variety of potential career opportunities and job placements for program graduates.

[1] Carnevale, Anthony P., Nicole Smith, & Jeff Strohl. 2010. *Help Wanted: Projecting Jobs and Education Requirements Through 2018*. Washington, DC: Georgetown University Center on Education and the Workforce.

[2] Manyika, James, Susan Lund, Byron August, & Sreenivas Ramas. 2012. Help Wanted: The Future of Work in Advanced Economies. n.p.: McKinsey Global Institute.

REAL-TIME AND TRADITIONAL LABOR MARKET INFORMATION DEFINED

Definitions of traditional and real-time labor market information are often confused and conflated. They both involve the collecting, analyzing, reporting, and publishing of data on economic activities to describe and forecast the relationship between labor demand and supply. Both can include the number of people employed, their wages and their occupations, the location of their workplaces in relation to where they live, the number of people available to work in a given geographic area, and forecasts of the occupations that will be in demand in the future.

Each state produces traditional employment and economic statistics in cooperation with the U.S. Department of Labor's Bureau of Labor Statistics. Other traditional labor market information sources include the Census Bureau, and O*NET, a database, sponsored by the U.S. Department of Labor, Employment and Training Administration.

Real-time labor market information includes similar types of data as well as new types based on aggregated online job postings. There are millions of online job postings in various formats and on various websites such as Craigslist or Monster.com. Several real-time LMI vendors, both for-profit and nonprofit, have created technologies and systems that spider and aggregate job ads, then parse them to extract industry, occupational, skills, certification, wage, and geographic information. These data are collected regularly and de-duplicated so that a posting is only counted once even if it appears on more than one website.

PROS AND CONS OF TRADITIONAL AND REAL-TIME LABOR MARKET INFORMATION

Because online job postings are continuously updated, they can reveal new and emerging trends that traditional occupational definitions may overlook. Real-time LMI offers insights into the skills and certifications sought by regional employers. When supplemented with data from employer advisor groups, student labor market outcomes, and traditional labor market resources, it enhances data-driven decision making based on a more robust picture of regional occupational and industry sectors.

Every data source has its flaws, especially with emerging tools that are still being field tested and validated by users. Common limitations of real-time LMI include duplication errors, although vendor de-duplication algorithms are

A CONSUMER'S GUIDE TO REAL-TIME LABOR MARKET INFORMATION

To create transparency in the real-time LMI arena, Jobs for the Future published *A Consumer's Guide to Real-time Labor Market Information*, based on a survey of and interviews with six of the largest real-time LMI data vendors. The publication explores a brief history and improvements that have been made in real-time data, products and data elements offered, sources of the data, quality assurance efforts, and the range of fees charged. The report is available at: http://www.jff.org/publications/education/vendor-product-review-consumers-guide-re/1417.

STUDENT LABOR MARKET OUTCOMES	→	
TRADITIONAL LMI	→	**DATA-DRIVEN DECISIONS**
REAL-TIME LMI	→	

SUPPLY	→	**DEMAND**	→	**STRATEGIC ALIGNMENT**
> Education enrollees > Education completers > Unemployed > Employed		> New hires > Replacement hires		> Qualified job referrals > Improved placements > Improved employer relationships > Improved counseling tools > Sector Strategy Alignment

increasing in sophistication, dramatically overcoming this difficulty. Additionally, certain trades (e.g., construction and manufacturing) do not necessarily use online job postings to advertise openings and consequently are not well represented in the data set. Job ads can also be vague, which affects whether the information can be accurately spidered. Furthermore, employers may post job openings as a means of gathering resumes for future consideration; not every posting represents an actual vacancy.

Traditional LMI has its own benefits and constraints. Traditional data are the best resource for wage expectations, unlike real-time LMI sources. Salaries are typically negotiated; therefore, the figures in job ads are unreliable.

One challenge with traditional LMI is that standard occupational codes (SOCs), which the Bureau of Labor Statistic selects for its studies and data reports, can be static, insufficient, or misleading in light of the dynamic nature of certain occupations. Consider desktop publishing, an occupation projected to boom when it first emerged. Since then however, traditional labor market resources have indicated that this is a constantly declining occupation, even though desktop publishing skills are often a prerequisite for many jobs (e.g., administrative assistant). Job training programs using SOC codes would determine desktop publishing to be a dying occupation rather than an in-demand skill to prepare their clients. A potentially key advantage of real-time LMI data is that it gives training programs better

insight into the design of an effective curriculum and then an innovative way to demonstrate its value to potential funders, clients, and employers.

In a similar vein, real-time LMI can help explore the specific ways in which traditional occupational definitions are shifting. Employers looking for someone with knowledge of environmental regulations may also want that individual to possess sales and marketing skills as well as proficiency in certain computer software. Most job postings identify the skills and the certifications required to perform the position, even if those specifications are not always complete.

Job postings also can reveal specific nontraditional occupational requirements (see box, Parsing for "Green" Skills and Certifications). As an example, one would expect being accredited with LEED Professional certifications to be one of the most commonly advertised requirements for green occupations, and real-time postings support that expectation. But a valid commercial driver's license also appears as a common requirement in many of those job postings, as does project management certification. Neither of those are traditionally thought of as "green" certifications, but if a person applying for green-related work lacks a driver's license, he or she may not be considered for the position. In this respect, real-time LMI is employer specific: the research can target a particular employer and ask, "What skills and certifications are they looking for?

PARSING FOR "GREEN" SKILLS AND CERTIFICATIONS

TOP 10 SKILLS, UNITED STATES, 2011	TOP 10 CERTIFICATIONS, UNITED STATES, 2011
> Environmental science	> Leadership in Energy and Environmental Design (LEED)
> Environmental health	> Professional engineer
> Water treatment	> Commercial driver's license
> Leadership in Energy and Environmental Design (LEED)	> Certified Energy Manager
> Energy management	> Project management certification (e.g., PMP)
> Natural gas	> Certified Safety Professional (CSP)
> Environmental regulations	> American Registry of Radiologic Technologists (ARRT) Certification
> Environmental management	> Six Sigma
> Energy efficiency	> Certified Industrial Hygienist
> Natural resources	> Engineer in Training Certification

SOURCE: Burning Glass Labor Insight

The aggregated real-time skills and certifications data also serve as valuable supplements to traditional measures of educational demand. The Bureau of Labor Statistics is the primary source for projecting education and job requirements, but its estimates of postsecondary education demand between 1998 and 2008 fell short of the actual postsecondary education demand in 2008 by 47 percent. According to the Georgetown University Center on Education and the Workforce, the reason is that the BLS holds educational demand constant; therefore, educational demand in its numbers changes only as a result of fluctuations in the mix of occupations in the economy, not when the requirements of an occupation change.[3]

To balance the advantages and limitations of each data source, job postings data should be consulted in conjunction with additional labor market indicators, using a mix of data sets when making education and training decisions. While numerous traditional and real-time sources provide national and state labor market information, job developers and counselors should continue to work with local employers, chambers of commerce, and professional organizations to help identify where the jobs are.

[3] See http://cew.georgetown.edu/jobs2018.

ANALYZING THE LABOR MARKET

Types of Information

> **Demographics:** Information about the characteristics of the population, such as where people live, education attainment, commuting patterns

> **Industry, Occupation, Wage:** Information about industries and occupations that are projected to grow or decline, staffing patterns, wages

> **Skills:** Information about the skills and certification requirements by occupation

> **Career Exploration:** Information about career pathways

Resources

Real-time LMI Software

These fee-based services provide aggregated job postings and parsing capabilities. They are particularly valuable for conducting dynamic regional and sector-focused labor market analyses.

> **Wanted Analytics:** www.wantedanalytics.com/

> **The Conference Board, Help Wanted Online:** http://www.conference-board.org/data/helpwantedonline.cfm

> **Burning Glass, Labor Insight:** www.burning-glass.com

> **Geographic Solutions:** www.geographicsolutions.com/index.asp

> **EMSI:** http://www.economicmodeling.com

> **Career Builder/Supply and Demand Portal:** www.careerbuilder.com/JobPoster/Products/page.aspx?pagever=SupplyDemandPortal

Skills Matching Software

These resources are structured to help individuals match their existing job experience, skills, certifications, and competencies to other potential occupations and careers. These resources feature user-friendly interfaces and can be a valuable resource for jobseekers.

> **mySkills myFuture:** www.myskillsmyfuture.org (free)

> **EMSI Career Coach:** www.economicmodeling.com

> **Transferable Occupation Relationship Quotient (TORQ):** www.torqworks.com

> **My Next Move:** www.mynextmove.org (free)

> **CareerOneStop:** www.careeronestop.org (free)

DEMOGRAPHICS	INDUSTRY/ OCCUPATION/WAGE	SKILLS	CAREER EXPLORATION
> Geography (Census) > Commutation Patterns (Census LED) > Population > Income	> Quarterly Census of Employment and Wages (QCEW) > Current Employment Statistics (CES) > Industry Staffing Patterns (OES) > Short- and Long-term Industry and Occupation Projections	> O*NET > mySkillsmyFuture	> MyNextMove
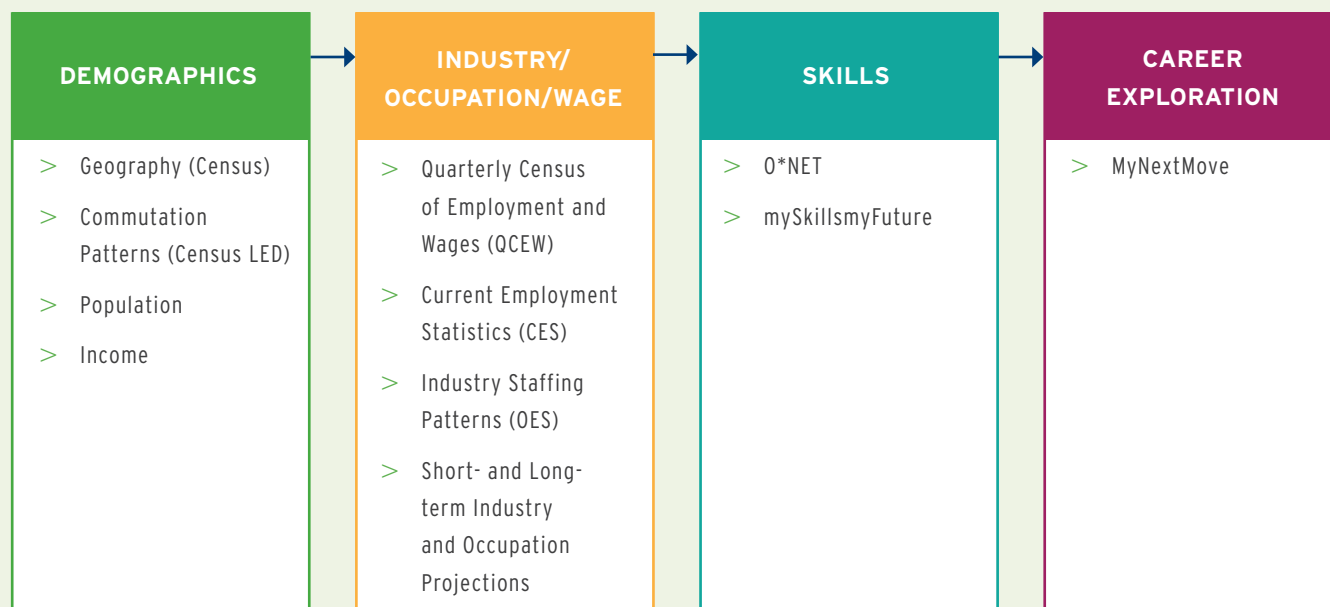
APPLYING REAL-TIME LABOR MARKET INFORMATION: EMPLOYER ENGAGEMENT

Successful workforce programs often rely on employer partners not only to hire program graduates but also to provide input and feedback on training design to ensure it meets local needs. These discussions are most useful when they are effectively framed by the workforce program. Success stories from real-time LMI users indicate that statistical data alone are insufficient for making sound education and training decisions. Instead, a rigorous analysis of the multiple data sources must be informed by understanding the preferences of local employers in the industry sector and the needs of participants to create useful information for employers, students, workers, counselor, and policymakers in the workforce and education arenas. Real-time LMI provides a critical source for program directors to draw questions from the data and raise them to employers, ultimately leading to or strengthening working relationships with them.

For example, an employer may advertise something in a job posting that is inconsistent with advice they have given to a provider of occupational training. Or an employer may post an ad for a position that is just what colleges in their advisory networks are training workers for. In either case, the training provider now has a good reason to pick up the telephone, call the employer, and open a conversation. In the long-term, the resulting collaborative discussion between trainer and employer can lead to direct or indirect placements of program clients and an ongoing job-referral pipeline.

Real-time LMI can also enhance the value of existing employer advisory groups by revealing information that employers included in their job ads but may not have brought to the attention of the program operator. As an example, JFF's Credential's that Work initiative studied employer advisory groups for an agency interested in conducting occupational training for a state's health care industry. Hospitals were the biggest employers in the region covered in the study, and most of the members of the employer advisory board were hospital representatives. Their input was consistent: people with certification as licensed practical nurses or certified nursing assistants did not always have the skills needed for those jobs at hospitals. Their message to community colleges was to stop offering certificates that did not reflect the type of worker needed. That could have been the end of the story, but an analysis of job postings through real-time labor market information software and student exit surveys found that many of the state's community health centers were hiring people with CNAs and LPNs and satisfied with them, but these employers were not represented on that particular advisory board. The real-time LMI provided information from outside the advisory group and also sparked substantive discussions at its meetings.

In another instance, the Clean Energy Council, a trade association, asked its real-time LMI provider to generate a report aggregating information from job postings and then convene about 50 employers to review the report. The employers were asked, "Does this sound real and relevant? Is this the current demand, and for the correct job titles? Are these the appropriate skills and certifications?" The answers provided input that training programs added to funding request, which were stronger because they reflected employer need. The employers also appreciated both the report and the opportunity to verify the ways it was right and wrong.

APPLYING REAL-TIME LABOR MARKET INFORMTION: GAUGING DEMAND

For occupational trainers, it is critical to demonstrate need for their program graduates as documented in real job openings. Some workforce programs rely on traditional labor market information to demonstrate market demand, while others collect less comprehensive, anecdotal data as their main reference. By reviewing millions of online employer ads, real-time LMI can help achieve a more complete understanding of labor and skill demand on a national or regional basis.

Table 1 illustrates how real-time and traditional LMI data can be used together to gauge occupational demand. The table shows the ten occupations with the most job postings in the United States for 2011, according to real-time LMI software. It also shows the 10-year growth, average annual openings,

median hourly wages, and degree completions for those occupations captured through traditional resources. In this case, registered nurse jobs are projected to grow nationally by 19 percent over the next decade, with 98,640 annual projected openings. Over the last year, employers placed 496,794 job ads for RNs. While ads do not directly translate to hires, the real-time data support the demand projections. The reported regional degree completions also show a potential need to train more nurses. More research and analysis are required before making any recommendations, but this chart serves as an example of how to interpret both data sets together.

In addition to analyzing market demand for occupations, it is important for training providers to remain attuned

TABLE 1.
TOP OCCUPATIONS BY NUMBER OF JOB ADS, UNITED STATES, 2011

SOC CODE	DESCRIPTION	2011 JOB POSTINGS	PROJECTED GROWTH 2011-2021	PROJECTED ANNUAL OPENINGS	2011 MEDIAN HOURLY WAGE	DEGREE COMPLETIONS 2010
29-111	Registered nurses	496,794	19%	98,640	$30.38	206,829
41-2031	Retail salespersons	421,008	9%	172,910	$9.69	6,127
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	398,385	8%	48,541	$24.49	17,391
41-1011	First-line supervisors/managers of retail sales workers	372,016	5%	64,083	$14.81	11,450
15-1031	Computer software engineers, applications	363,359	25%	18,711	$39.72	37,023
15-1032	Computer software engineers, systems software	351,196	23%	13,902	$42.28	46,090
53-3032	Truck drivers, heavy and tractor-trailer	282,880	133%	64,961	$17.95	16,615
43-4051	Computer service representatives	253,739	18%	111,656	$14.53	2,156
15-1051	Computer systems analysts	248,061	14%	22,095	$33.77	37,943
43-6011	Executive secretaries and administrative assistants	200,712	11%	36,903	$19.15	30,623

SOURCE: EMSI Complete Employment 2011.4 and Burning Glass Labor Insight

to the market demand for a particular skill, so that they can ensure that their curricula remain relevant to the respective professions. Skill demand knowledge also helps job developers to steer jobseekers with a specific skill set into a new occupation that might not have been included in the original goals of a training program. For green job developers, in particular, information about skill demand is critical in identifying the skills that jobseekers should acquire in order to apply for a green job. The ability to conduct an analysis of current, dynamic skills is another key value of real-time LMI technologies. Traditionally, this type of skills information is obtained from employer advisory boards or the fairly static lists of occupational "knowledge, skills, and abilities."

Figures 1 and 2 contain additional examples of how real-time LMI can supplement the traditional collection of skills information. Figure 1 shows the top occupations requesting green skills nationally in 2011, while Figure 2 shows the top green skills advertised in job postings. Since such information also can be pulled regionally, occupational trainers and green job developers can conduct searches for the types of green skills being requested in their local areas, then crosswalk that information with what their employer advisory boards say, thus helping jobseekers acquire necessary skill sets.

FIGURE 1.
TOP OCCUPATIONS REQUESTING GREEN SKILLS, UNITED STATES, 2011

Occupation	Value
Mechanical Engineers	27,107
General and Operations Managers	8,856
Maintenance and Repair Workers, General	8,520
Information Technology Project Managers	6,720
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	6,313
Environmental Engineers	4,964
Environmental Scientists and Specialists, including Health	4,818
Electrical Engineers	4,585
Civil Engineers	3,902
Office Clerks, General	3,859

FIGURE 2.
TOP GREEN SKILLS REQUESTED, UNITED STATES, 2011

Skill	Value
Repair	27,107
Inspection	26,794
Scheduling	22,094
HVAC	21,639
Environmental Science	21,260
Environmental Health	19,537
Mechanical Engineering	18,460
Business Development	17,884
Chemistry	17,450
Water Treatment	16,723
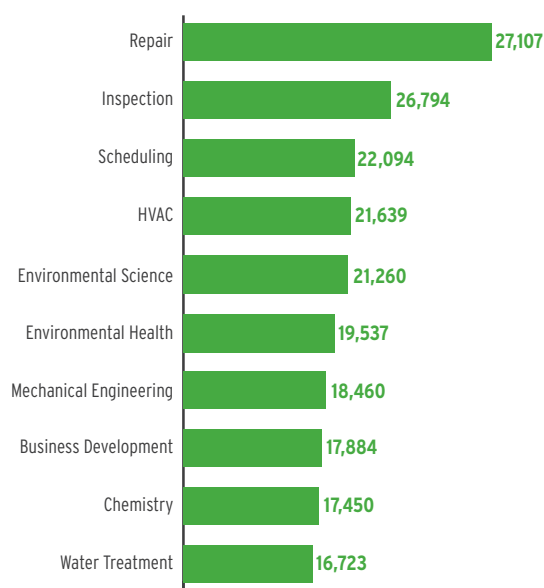
APPLYING REAL-TIME LABOR MARKET INFORMATION: SKILLS TRANSFERABILITY

Job developers can take advantage of real-time LMI to maximize the range of job opportunities for their program graduates. Many workers have skills that could be transferred from a previous job to a new occupation. In other cases, skills obtained through a training program may be sought by employers in different sectors than the program expected. The recession of 2007 has restructured the economy, resulting in the need for job developers to increase their knowledge of these opportunities and to counsel jobseekers about them. In fact, as a result of the recession, students may have been trained for occupations that no longer exist but still have skills that can be transferred with minimal additional training. They have acquired job-related knowledge, skills, and abilities through job experience, education, and volunteer work.

For green job developers, in particular, determining skills transferability is a priority in order to identify potential occupations and employers for individuals possessing a green-related skill set. Several traditional and real-time labor market information resources are available to assist in their efforts. In Figure 3, real-time LMI software uses advertised skill prerequisites as a mechanism for sorting job postings, which can help green job developers supplement their jobseeker referrals. This example lists the top occupations requiring environmental regulations knowledge as a prerequisite. A job developer could run this type of request for regional job postings to determine potential employers and occupations for individuals who have experience working with environmental regulations.

Other web-based skills-transferability tools repackage labor market information in friendly user-interfaces that enable jobseekers and the staff of workforce organizations to match a worker's occupational skills and experience with the skills needed in other occupations. Two examples are the U.S. Department of Labor's mySkills myFuture or EMSI's Career Coach. For a list of these tools, see the box, "Analyzing the Labor Market," on page 5. These tools facilitate upward mobility by:

> Helping identify related careers to explore;

> Providing information about transferable skills;

> Linking to local training opportunities; and

> Providing job listings.

FIGURE 3.
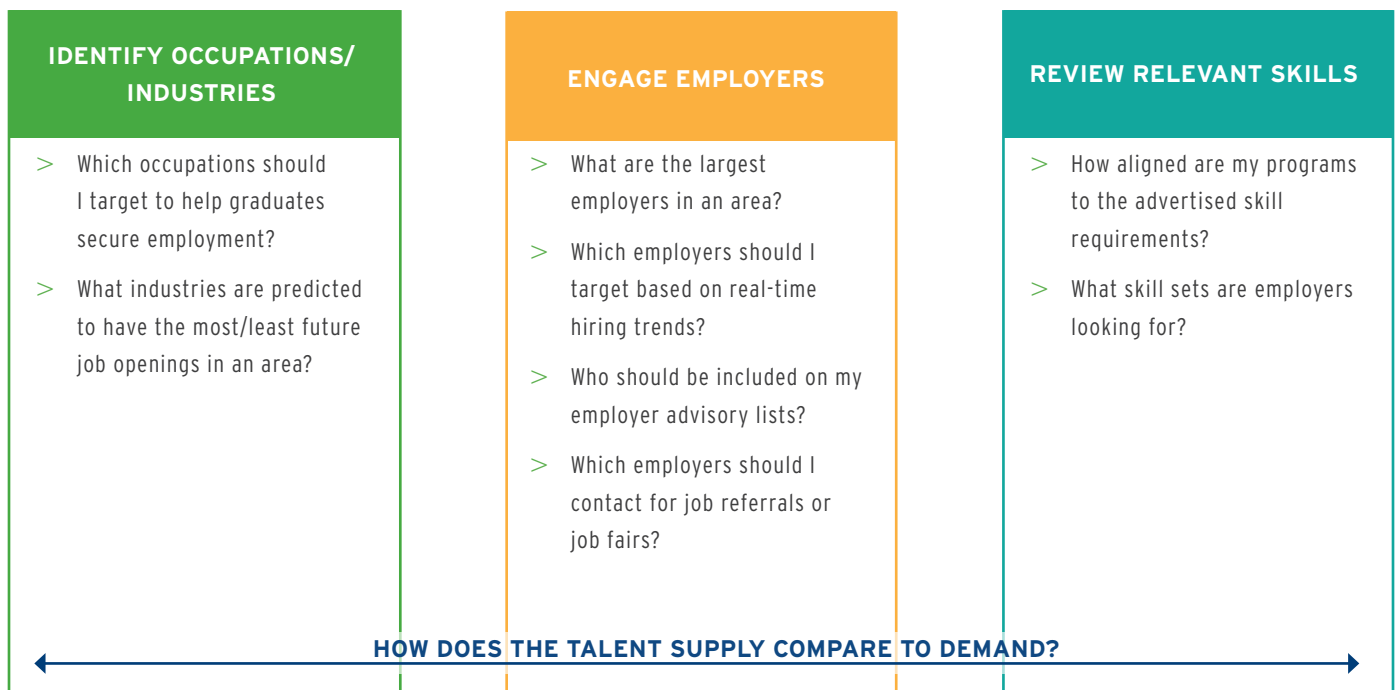**OCCUPATIONS REQUIRING ENVIRONMENTAL REGULATIONS, 2011**
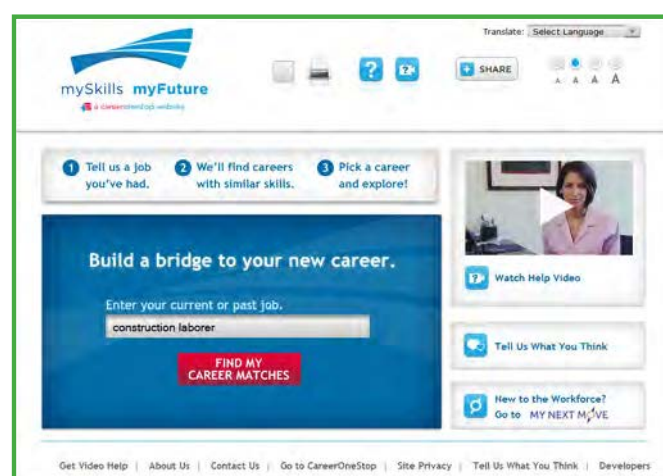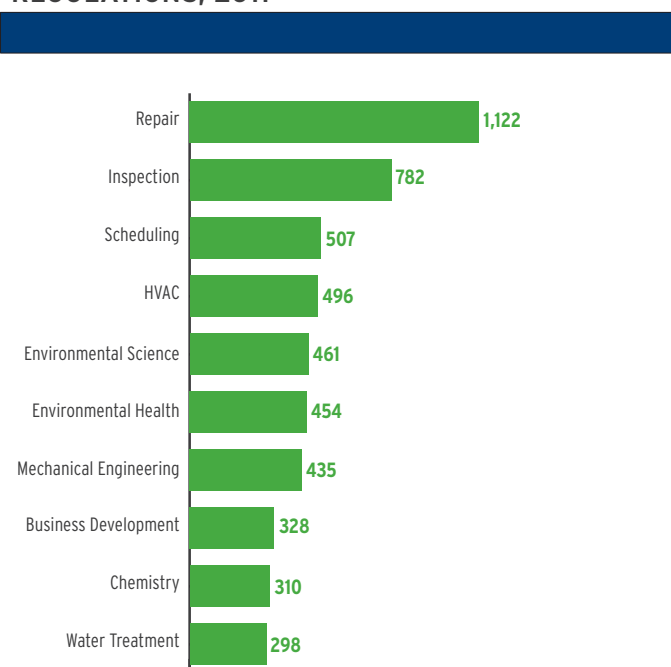
TOWARD PRACTICAL APPLICATIONS

Connecting individuals to promising jobs is a difficult, complex task. The ability to access actionable current information is critical to designing and strengthening training programs that lead to employment and for making policy decisions that support the same goal. Data-driven decisions can improve program outcomes and employability, and conducting labor market research or assessments is a step toward reemploying the unemployed worker or student. While it can be easy to get lost in volumes of data and data sources, accessing traditional and real-time LMI will lead to practical solutions.

The following steps can help program designers, job developers, and counselors make data-driven decisions:

> **Problem Identification:** Identify research questions. Once a problem is identified, develop a systematic approach to achieve a solution.

> **Market Demand:** Gauge demand. Use traditional labor market or real-time LMI to determine industries and occupations that are hiring today and that are projected to hire in five to ten years.

> **Tool Selection:** Select the right tools for analysis. For example, use of a real-time data source is recommended to identify demand, while traditional LMI are useful to indicate expected wage outcomes.

> **Identify Gaps:** Create a gap analysis. Use information from tools to create a skills matrix. Identify baseline and required skills and certifications for target occupations. Help students/unemployed conduct an assessment of skills transferability.

> **Placement and Referral:** Use labor market data for skills transferability analysis, job placement, job referral, or employer engagement.

IDENTIFY OCCUPATIONS/ INDUSTRIES	ENGAGE EMPLOYERS	REVIEW RELEVANT SKILLS
> Which occupations should I target to help graduates secure employment? > What industries are predicted to have the most/least future job openings in an area?	> What are the largest employers in an area? > Which employers should I target based on real-time hiring trends? > Who should be included on my employer advisory lists? > Which employers should I contact for job referrals or job fairs?	> How aligned are my programs to the advertised skill requirements? > What skill sets are employers looking for?

HOW DOES THE TALENT SUPPLY COMPARE TO DEMAND?

Appendix K

Alaska Environmental Scans

- Alaska Housing Finance Workgroup
- AMHTA Employment Focus Area Workgroup
- Anchorage Mental Health Court
- Anchorage School District
- Behavioral Health
- Veteran's Employment Training Service
- Governor's Council on Disability and Special Education
- Alaska Job Centers

AMHTA Employment Focus Area Work Group
Environmental Scan

April 16, 2014

- Alaska Housing Finance Corporation is a statewide Housing Finance and Public Housing Authority charged with facilitating home ownership, affordable rental housing, and multi-family development opportunities throughout Alaska. We currently own and operate about 1,600 public housing units and administer about 4,300 Housing Choice Vouchers in sixteen locations throughout the state. Our Mortgage Department offers first time homebuyer and multi-family property loans through local lenders, as well as the "Home Choice" homeownership preparedness class throughout the state to encourage homeownership.
- Our Public Housing Division offers safe, affordable apartment rental and assistance opportunities to persons of low and modest incomes.
- AHFC rental assistance programs are targeted to persons and families earning less than 80% ($44,750 for a family of one in Anchorage) of the local median income for each area we serve. Our Public Housing Program is targeted to families and individuals earning less than 50% of the median income ($29,750 for a family of one in Anchorage) for each of our locations.
- We are in the process of implementing a Rent Reform program, which will significantly change the rent structure of all households participating in our rental programs with at least one adult over the age of 18 that is not elderly or experiencing a disability. Current data indicates only 23% of these household configurations report any type of earned income. Over a period of five years, rents will increase each year until the rent is approaching a number somewhat close to market value in year five.
- As a result of Rent Reform, we are expanding our employment referral bases significantly, and partnering with service providers to assist with financial literacy and employment search skills.
- Households comprised entirely of elderly or disabled individuals will see little change to their rent structures, but are encouraged to pursue the expanded financial skills and employment search opportunities we are

creating. A significant number of our clients most likely fall under the umbrella of Mental Health Trust beneficiaries.

- We currently track employment data, household income, family size, and related demographic data for all of our populations and are looking into breaking out sub-groups for measurement purposes.
- We look forward to a continued discussion with the Trust and other members of the Working Group to leverage both educational and employment opportunities for all of our mutual clients

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Anchorage Mental Health Court

Employment Focus Area information—For 2-28-2014 AMHTA meeting

- o **Who do you serve?**
  The **Coordinated Resources Project (CRP)** - also known as the Anchorage **Mental Health Court** - is a voluntary "therapeutic" or "problem-solving" court located within the Anchorage District Court that hears cases involving individuals diagnosed with mental disabilities who are charged with criminal offenses and focuses on their treatment and rehabilitation. Created in 1998, the CRP is a post booking diversionary response to the problem of "criminalization" - or an increased likelihood that people with mental disabilities will be processed through the criminal justice system instead of the mental health system - observed in the Anchorage area. The CRP serves Alaska Mental Health Trust Beneficiaries.
  What are your roles and responsibilities in regards to employment?
  Our case coordinators conduct a risk assessment to identify risk and need areas. We utilize the Level of Service Case Management Inventory, a tool that assesses risk for eight key criminogenic risk areas (criminal history, **education/employment**, family/martial, leisure/recreation, companions, alcohol/drugs, attitudes/orientation and antisocial patterns). Based on the results of the risk assessment, the case coordinators prioritize problem areas and link participants to supports in the community as part of the individualized treatment plan.
  Many CRP participants are homeless, unemployed and without benefits. The benefit process is taking a long period of time; there are issues with benefit applications being held up at the federal level (social security applications). As a result, participants have limited or no income and many of our participants depend on Trust flex funds for housing needs; we know these funds are limited. Participants need meaningful daytime activities— employment can provide natural supports and help engage beneficiaries into the community as a productive member of society. Studies demonstrate that employment significantly reduce recidivism (in comparison to other interventions alone). Employment is a key strategy to reduce recidivism and enhance the quality of life for Trust beneficiaries.
- o **Who is your target population?** Alaska Mental Health Trust Beneficiaries who have committed a criminal offense (misdemeanor or Class C felony). Focus: SMI, IDD, TBI, general MH. Individuals must live in Anchorage and we need to be able to link them to existing resources in the community.

- o **How do Trust beneficiaries fall into all of this?** Criminally involved Trust beneficiaries are in need of employment to1) help reduce recidivism, 2) engage in meaningful daytime activities, 3) obtain work skills (and improve relationship skills), 4) earn money to pay for housing and food 5) integrate into the community as a productive member of society.
- o **What is your existing data like and how do you measure it?** CRP staff collect basic demographic data on all individuals referred to the CRP; additional, comprehensive data is collected on all participants. Prior studies of the CRP have focused on reduction of criminal and clinical recidivism. The CRP has collected information on education status and employment status (y/n) supported employment status (y/n) from 1999 to Oct 2013. No formal analysis of employment status of participants to date. In November of 2013 the CRP transitioned to a new data system through AK AIMS E-CourtsNote, the CRP has not fully transitioned to the new data components—we are in the process of identifying key data elements to collect that will be consistent with existing mental health courts in AK (Anchorage, Juneau, Palmer). **See information below on 1) employment and education of CRP participants for the 2nd quarter of FY 14 and 2) current data fields in AK AIMS.**

Snapshot of CRP Active participants 2nd quarter of FY 14.

89 participants were active during the 2nd Quarter of FY

CRP Employment status of 89 active participants (general categories):

Employed	7	
Unemployed	17	
Disability Benefits	48	
Retired-Pension	1	
Unemployed: Seeking disability benefits	16	
	89	Total

CRP Education Status:

2 participants were enrolled full-time at the Anchorage School District—Special Education Program.

1 participants was enrolled in classes at UAA part-time

Employment data 2nd quarter FY 14 Anchorage Mental Health Court Participants (specific categories)

Employed Full Time	2	
employed part time	2	
employed p/t; college p/t	1	
employment, supported; full benefits	2	
Not employed; social security benefits	42	
Not employed; VA benefits	1	
Not employed; applied for benefits	15	
Not employed; child support	1	
not employed; full benefits; full time student HS special education	2	
not employed; full benefits; seeking work	3	
Retired-pension	1	
not employed; not seeking work	9	
not employed; seeking benefits; seeking work	1	
not employed; seeking employment	7	
	89	total

Data fields in AK AIMS:
Attending School Full time
Employed Day Labor
Employed f/t 34 hrs plus
Employed p/t 0-8 hrs, 16-24 hrs, 24-32 hrs, 8-16 hrs
Homemaker f/t
In skills development training

Incarcerated (cannot work)
Other, out of work force
Retired; permanently out of work force
Seasonal employment
Unemployed; not seeking work
Unemployed; seeking work
Unknown
Volunteer work
Disabled (cannot work)
Employed
Unemployed
Retired

o **How could the Trust support or enhance your efforts**?
The Trust can help by providing advocacy and support to enhance and promote mechanisms to increase employment opportunities for criminally involved Trust beneficiaries.

The Trust can focus on developing employment opportunities for Trust beneficiaries. They can help to advocate for the development of strategies to engage employers to hire beneficiaries. This could include providing information about **tax incentives** for hiring ex-offenders and individuals on social security and public assistance. **Bonding programs** can also be explored.

Our community is growing; we recognize that Anchorage is fortunate to have jobs in the current economy. Big businesses come to Anchorage— that means jobs. Employers want people to come to work and do their job, regardless of a focus on their disability. They want people who show up on time, get along with others, do the work, and come back the next day. Individual develop a work ethic—employers want hard workers. The Trust can advocate, through *social media* for the need to give people a second chance; **eliminate barriers** (criminal convictions, active criminal cases). Additionally, beneficiaries need **incentives to work**. They need assistance with rent for a set period of time while employee begins to work, then financial assistance fade out. Beneficiaries need the incentive that they will not lose their **medical benefits** if they work. They also need access to employers who will **pay a living wage** and provide **medical benefits**.

Supported employment—More efforts towards supported employment should be explored. Assets does good job. ACMHS? WEB? Other than Assets, there are limited options for supported employment in the

community. Provide funding for **employment specialists** and **job coaches** to help beneficiaries get and keep a job.
DVR—limited success with referring criminally involved beneficiaries to DVR. How can we strengthen collaborations with this resource?
Job fairs—attract beneficiaries at job fairs. Develop a "good-guy" list of employers that hire criminally involved individuals who are Trust beneficiaries. Focus on **job development** with new employers.

Environmental scan Anchorage School District
Prepared by David Kohler

Who do you serve?
ASD serves students with disabilities ages 3-21.

What are your roles and responsibilities in regards to employment?
As Post-secondary transition coordinator, my primary role involves working with all schools in developing and implementing transition plans as well as interfacing with community entities involved in employment of people with disabilities. I have other responsibilities that do not relate directly to post-secondary transition so will not be discussed here.

Who is your target population?
Students aged 15-21 who receive special education services.

How do Trust beneficiaries fall into all of this?
We serve the same populations as the Trust other than people with Alzheimer's. The terminology of education and the human services field often do not align neatly, but the children's needs and our goals remain the same.

What is your existing data like and how do you measure it?
Currently the data we are required to take focuses on compliance rather than post-secondary employment or education. The state collects data on the number of students with disabilities who are enrolled in some type of post-secondary education or competitively employed one year after leaving high school.

How could the Trust support or enhance your efforts?
ASD would like to increase the blending and braiding of services and funding with community agencies. The Trust's initiative on employment will bring key players to the table with the goal of developing sustainable services and funding sources. Specifically, we would like to improve our transition services for students certified under the categories "Emotional Disturbance" and "Autism". There are also students who do not fit neatly into a category under DD definitions but are in significant need of services.

Behavioral Health

- All Members Report on their Environmental Scans of their Entity

    Answering the following questions:

    - Who do you serve? 66 grantees/Providers serve:

        SMI (Serious Mental Illness)
        SED Children/Youth (Severe Emotional Disturbance)
        SA Youth & Adults (Substance Abuse)
        PES (Psychological Emergency Services)

    - What are your roles and responsibilities in regards to employment? As Supported Employment Program Coordinator, goal to establish an employer network, facilitate collaboration between Providers and State agencies (DVR), develop tools (DVR referral form & DPA Assessment tool), develop Medicaid billing training and establish APSE Chapter

    - Who is your target population? Individuals with Intellectual Disabilities

    - How do Trust beneficiaries fall into all of this? Providing services to Alaskans that experience a mental illness, a developmental disability, chronic alcoholism, traumatic brain injury, or Alzheimer's disease or a related disorder; they receive services under the Comprehensive Behavioral Health Treatment & Recovery Grantees .

    - What is your existing data like and how do you measure it? Only three Grantees receive specific DBH funds for Supported Employment, although many Providers are currently providing employment services.

    - How could the Trust support or enhance your efforts? Continue to emphasize and allocate funds in the Supported Employment arena.

- General Updates from Members Regarding Upcoming Entity Projects/Events, etc.

- Discussion of Upcoming Meeting Dates/Schedules

Trust Employment Focus Area

Aaron Gustafson – Alaska Director of the Veterans' Employment and Training Service (VETS) a sub-agency of the U.S. Department of Labor

<u>VETS' Mission:</u> Serve veterans & service members by providing resources and expertise to assist and prepare them to obtain meaningful careers, maximize their employment opportunities, and protect their employment rights.

1. **Who do you serve?**

   All veterans in the State of Alaska

2. **What are your roles and responsibilities in regards to employment?**
   - Oversight of employment and training programs
   - Specifically, VETS serves veterans through our P-3 Campaign:
     - We **Prepare** our service members for transition to the civilian workplace through our employment workshop
     - We **Provide** our veterans employment placement assistance through our network of American Job Centers and various programs targeted at assisting homeless and other disadvantaged veterans to obtain employment
     - We **Protect** the employment rights of those service members who responded to the call to serve and ensure preference is given to veterans with respect to Federal hiring
   - Promote veteran hire
   - Increase community involvement and collaboration with partner agencies

3. **Who is your target population?**

   Veterans that require employment and training services

4. **How do Trust beneficiaries fall into all of this?**

   Veterans fall into a number of beneficiary categories specifically, PTSD, Traumatic Brain Injuries, Substance Abuse, and other disabilities resulting from military service

5. **What is your existing data like and how do you measure it?**

   The Alaska Department of Labor and Workforce Development is able to capture a wealth of employment data through the Alaska Labor Exchange System (ALEXsys), Unemployment Insurance, and Wage Data information systems

6. **How could the Trust support or enhance your efforts?**
   - Collaborative partner agreements (MOUs) and communication
   - Promoting awareness of existing programs and services
   - Additional resources to support increased staffing and IT systems improvements

Trust Employment Focus Area Work Group Environmental Scan: Governor's Council on Disabilities & Special Education

Who do you serve?

The Council uses planning, capacity building, systems change, and advocacy to create change for people with disabilities.

The Council serves a variety of federal and states roles:
- Connects the public with policymakers regarding legislation that impacts the lives of families and individuals with disabilities.
- Serves as the State Council on Developmental Disabilities (per Developmental Disabilities Assistance and Bill of Rights Act).
- Serves as the Interagency Coordinating Council (ICC) for infants and Toddlers with Disabilities which advises and assists Alaska's statewide Early Intervention/Infant Learning Program (per Individuals with Disabilities Education Act, Part C).
- State Advisory Panel on Special Education (per Individuals with Disabilities Education Act).
- Serves as the governing board for the Special Education Services Agency (SESA) which supports the effective education of students with low incidence disabilities throughout Alaska.
- Beneficiary Board: Reports to the Alaska Mental Health Trust Authority on the status and needs of individuals with developmental disabilities and their families and makes recommendations for funding on their behalf.

The Council is composed of 28 members appointed by the Governor on a revolving basis by an application process.

The Council is made up of the following demographics:
- 20% individuals with I/DD,
- 20% family members of individuals with I/DD,
- 20% individuals with I/DD or family,
  - Essentially, 60% representation by individuals w I/DD & family
- 40% agency representatives

There are 10 Council staff.

What are your roles and responsibilities in regards to employment?

Specifically, in the Council's 5-Year Plan, the following employment goals have been delineated:
- Advocate for the State of Alaska to become a model employer and increase the use of the provisional hire program
- Increase opportunities for people to become self-employed

- Increase the employment of youth transitioning from high school to adult life through Project SEARCH
- Change the DD home and community-based waiver and Medicaid State Plan services to increase employment supports
- Advocate for "Employment First Legislation"
- Provide support to the Peer Power employment initiative
- Work with the Center for Human Development and other stakeholder to operate the microenterprise grant program

The Council has an Employment & Transportation Ad Hoc Committee that works on all issues relating to disability employment. Some recent examples are: advocating for the Employment First bill (HB 211 & SB 163), job fair disability employment resources and navigation for people with disabilities, as well as partnering with the Center for Human Development to provide Customized Employment training across Alaska.

The Council also has a grant called the Alaska Integrated Employment Initiative (AIEI) which focuses on improving the employment outcomes for youth and young adults in Alaska with disabilities. In addition, the Council serves on the application review committee for the Trust's Microenterprise fund, and oversees the success of 4 Project SEARCH locations across Alaska (one year intensive transition program for students with disabilities, age 18-22).

The Council has two staff dedicated to employment of persons with disabilities. One staff will be working closely with the Trust Employment Program Officer 80% of the time, and the other staff working 20% of the time specifically dedicated to the new Trust Employment Focus Area.

Who is your target population?

Our primary target population as the Council on Developmental Disabilities is those with Intellectual/Developmental disabilities; however our programs almost always overlap with Alaskans of all ages that experience all types of disabilities and their families.

We also work closely with providing agencies, the Trust, other partner boards, other department and division representatives, as well as lawmakers. In addition, we seek to provide disability awareness to the general population, and have especially been working on employer awareness recently.

How do Trust beneficiaries fall into all of this?

We serve people with developmental disabilities, which is one of the Trust Beneficiary categories. Note, that people with developmental disabilities whom we serve may also experience a dual diagnosis of mental illness or have chronic alcoholism and other substance related disorders which are two other Trust Beneficiary categories.

What is your existing data like and how do you measure it?

The council collects data for grant reporting (AIEI grant) as well as for federal reporting in our annual Program Performance Review (PPR) which assesses how we've done in meeting our

goals and objectives (employment has a specific section of goals and objectives). We measure based on how many people we made aware/informed/reached, as well as utilize American Community Survey to stay up to date with current Alaska employment numbers regarding people with disabilities. We also measure based on Council legislative priorities being made into law, departments implementing Council recommendations, etc. We are currently working with the Trust to establish new datasets that apply to employment of all Trust beneficiaries.

How could the Trust support or enhance your efforts?

Any of the Council's efforts towards disability employment could be enhanced by the Trust's support and additional focus of staff and resources. Specifically, the Trust could help immensely with training such as benefits counseling and customized employment, as well as working on a stronger Alaska data system in relation to employment data and long term outcomes.

Alaska Job Centers Environmental Scan

- *Who do you serve?*
  - *Job Center as a whole serve any Alaskan looking for work or employer seeking employees*
  - *Under DEI grant we serve social security beneficiaries looking for work*

- *What are your roles and responsibilities in regards to employment?*
  - *Anything and everything from helping folks with their first job or career change including preparing for (training) applying for and securing employment*
  - *Supporting employers meet their workforce needs.*
  - *Providing*

- *Who is your target population?*
  - *Job Center as a whole anyone of working age*
  - *Under DEI SSI and/or SSDI recipients wanting to secure meaningful and self-sustaining employment. Ages 18 to 64*

- *How do Trust beneficiaries fall into all of this?*
  - *Any Trust beneficiary looking for work or who is an employer would fall into this*

- *What is your existing data like and how do you measure it?*
  - *We measure all services given to job seekers and employers as required through our federal reporting structure. We measure it through our labor exchange system ALEXsys and through the ICM system for training services and expenditures for individuals. Required measurements are WIA common measures: Entered employment, retained employment and earnings progression*

  - *For DEI we are measuring the number of Social Security beneficiaries who have assigned their tickets to us through our Employment Networks statewide. We measure it with a combination of data through Maximus and SSA and our own records kept within Excel*

- *How could the Trust support or enhance your efforts?*
  - *Refer any trust beneficiaries who are ticket holders wanting to work to our EN for Employment Services and assignment of their ticket*
  - *Collaborate on employment opportunities and initiatives for placing workers with disabilities*
  - *Assist with development (capacity building) of Certified Work Incentives Counselors*
  - *Assist with promotion of new requirements under Section 503 and VEVRAA to federal contractors to assist with hiring persons with disabilities*