

Part Two: W-2 and Related Programs Plan

Section Two: Program Plan

Subsection D: Supplemental Security Income (SSI)/Social Security Disability Insurance (SSDI) Advocacy Agency Response Items (SSIA) Response Items

2.D.1 Agency Case Management Philosophy

Summary:

W-2 Contract Agencies must provide W-2 services through mutually respectful partnerships with participants.

Response Items:

- a) Describe your agency's case management philosophy on engaging participants in order to provide quality individualized services. Include in your response how your agency will ensure each staff member is adhering to your agency's philosophy.
- b) Describe how your agency will assist participants to recognize their strengths, assets, aspirations, resiliency and potential to achieve economic stability.

2.D.2 Coordinating Referrals from the Milwaukee Eligibility and Assessment Agency (EAA)

Summary:

To help a new participant reach his/her goals, the SSI/SSDI Advocacy Agency (SSIA) must first understand what brought that parent to the W-2 program. The initial assessment will be conducted by the EAA. The EAA will use this assessment to make a placement determination and develop the initial Employability Plan (EP).

The SSIA will coordinate with the EAA to review the information gathered during the application process and plan for transfer of the case.

Response Items:

- a) Describe how your agency will work with the EAA to ensure that there is a transfer of knowledge about the new participant. Include how your agency will ensure that there is a face-to-face joint staffing with each participant as part of the transfer of the case from the EAA to the SSIA to determine appropriate assignment of W-2 activities using screening and assessment results and initial EP as a guide.
- b) Describe how your agency will quickly establish a supportive working relationship with each new participant referred to your agency.

2.D.3 SSI/SSDI Advocacy for W-2 Participants

Summary:

Through screening, formal assessment, and consultation with other providers of disability-related services, the SSI/SSDI Advocacy Agency (SSIA) is responsible

for serving participants who have a reasonable chance of obtaining SSI/SSDI. When there is agreement between the participant and the agency that the participant is appropriate for SSI/SSDI advocacy, the agency is responsible for assisting with the SSI/SSDI application and appeals process to the extent needed by each participant. SSI/SSDI advocacy must be provided either directly by the agency or through referral to an SSI/SSDI advocate. Access to free and reduced-fee legal services should be discussed with the participant before making a referral.

Response Items:

- a) Describe the SSI/SSDI advocacy services that your agency will offer. Include the services that will be offered at every part of the process from the application for SSI/SSDI to the final Council Review.
- b) Describe how your agency will work with people who have legal representation. Describe the services your agency will provide. Describe the type of relationship your agency will establish and maintain with the legal representation.
- c) Describe how your agency will review and monitor the progress of the SSI/SSDI application process for participants receiving SSI advocacy, including those participants receiving SSI advocacy from an external source.
- d) Describe what staff within your agency will provide SSI advocacy, and what experience and training qualifies them to perform these functions. If external sources will be used, identify the source and the relationship your organization has with that source(s).

2.D.4 W-2 Case Management for Participants Receiving SSI/SSDI Advocacy

Summary:

Participants appropriate for SSI/SSDI advocacy have disabilities that may require the SSIA to provide a more intensive case management approach. The primary goal is to assist the participant in successfully securing SSI/SSDI as a benefit to support their family and also to be educated on long term skills to ensure that the family remains financially stable. These efforts should be inclusive of the participant's abilities; but take into consideration the family as a whole, understanding that the family needs may hinder participation.

2.D.4.1 Case Management, and Ongoing Assessment

Summary:

The SSIA must work with the participant using informal and formal assessment. For an agency to be successful they must quickly establish and maintain a supportive working relationship with the participant. This is done through intensive, quality case management services provided in a culturally sensitive manner, and individualized to the needs and capabilities of each W-2 participant. The SSIA must use the information gathered throughout the parent's participation and experiences in W-2 to work with the parent to regularly reassess their placement.

Response Items:

- a) Describe how your agency will provide ongoing informal and formal assessments and use the information to work with the participant to identify any needed changes in activities and in the participant's SSI/SSDI application. In your response cite the specific tools your agency will use.
- b) Describe how your agency will ensure that each participant is engaged in high quality case management services. Include the frequency and mode of contact your agency will provide.
- c) Describe how your agency will help the participant identify his/her short-term goals, and the action steps needed to accomplish the participant's long-term goals.
- d) Describe how your agency will continue to engage the participant over time to review and adjust his/her long and short-term goals based on his/her participation and experience in W-2 activities.
- e) Describe the process your agency will use to redirect a participant who has been denied eligibility for SSI/SSDI (which may include exhausting one or more levels of the appeal process) towards an employment focus. What information will your agency gather when building a case to recommend to the EAA transfer to the Milwaukee W-2 Employment Agency (WEA).
- f) Describe what staff within your agency will engage participants in case management and ongoing assessments, and what experience and training qualify them to perform these functions.

2.D.4.2 Employability Planning

Summary:

The SSIA must work with the participant to develop an Employability Plan (EP).

The EP includes the participant's long-term goal identified through the case management planning process. The activities recorded on the EP focus on steps needed to achieve the participant's short-term goals.

An EP should be considered a living document. The activities recorded on the EP reflect the individual's current goals and activities.

Throughout an individual's participation in W-2, the W-2 Agency is continually gathering information about the individual's capacity to work and ability to gain SSI/SSDI through formal and informal assessments, through the case management relationship, and through the individual's experience participating (or failing to participate) in assigned activities including work experience. This information must be used as the basis for reassessing with the participant his/her assigned activities.

Response Items:

- a) Describe how assessments and the individual's past participation will be used when working with the participant to develop and/or update his/her EP.
- b) Describe how your agency will work with W-2 participants to ensure that the assigned activities align with the participant's unique skills, interests, capabilities, goals, and other life circumstances. Provide examples in your response.
- c) Describe how your agency will ensure that participants have the necessary supportive services, accommodations, auxiliary aids, and communication assistance required to participate to the fullest extent possible in assigned activities.
- d) Describe the approach your agency will take to assist the W-2 participant in balancing family life responsibilities and W-2 activities.
- e) Describe what staff within your agency will engage participants in the development and ongoing maintenance of the EP, and what experience and training qualifies them to perform these functions.

2.D.4.3 Creating Relevant Work Experience Services and Activities

Summary:

The SSIA is responsible for creating and managing work experience for all SSIA participants who are capable to participate. These sites must include employment supports tailored to the needs of the participant. Including job coaching, access to supported work environments and other work accommodations to ensure the participant can participate to the fullest extent possible. The following types of organizations may serve as work experience: public sector, private sector, for profit and not for profit employers, faith based organizations, or community based organizations (CBO).

The SSIA is responsible for ensuring that necessary accommodations are provided.

Response Items:

- a) Describe how your agency will develop a preferred provider network of diverse and culturally sensitive community and faith-based organizations that can provide a continuum of individualized employment and training services. This continuum should include specialized service delivery to participants with special needs; i.e. those that have experienced domestic violence, individuals affected by mental health issues, or suffer from Alcohol and Other Drugs Assessment (AODA) issues, or those with a criminal history in a W-2 Transition (W-2 T) placement. Your agency's response should include a list of providers with which your agency has or will establish(ed) relationships, and a description of how you will identify new providers when necessary.

- b) Describe how your agency will develop relevant work experience. Include how your agency will connect participants to high quality work experience and subsidized employment sites provided by other workforce development partners (e.g., Workforce Investment Act (WIA), Division of Vocational Rehabilitation [DVR]). Provide examples in your response.
- c) Describe how your agency will ensure that the participants have necessary accommodations. Also include in your response who will provide participants with, job coaching, and/or mentorship to ensure the participant can participate to the fullest extent possible.
- d) Describe how your agency will monitor the participation and progress of each participant at a work site, and whether the participant is developing the hard and soft skills they need to obtain and retain unsubsidized employment. Include your role in helping resolve issues that develop at the work site. Also include how your agency will use the information gathered from the participant's experience in the work site to update the EP, SSI/SSDI Application/Documentation, and W-2 placement.
- e) Describe what staff, within your agency or within the broader workforce development/job center system will create and manage work experience, and what experience and training qualifies them to perform these functions.

2.D.4.4 Connecting Individuals to Education and Training

Summary:

Though the primary goal of the SSIA is to assist a participant in securing SSI/SSDI benefits, this does not guarantee that the participant will have these benefits for the rest of their life. SSI/SSDI benefits are often reconsidered or overturned in future redeterminations, and the benefits can also be supplemented with earnings. The SSIA will work with participants to connect them with education and training opportunities. Agencies develop processes to match participants with appropriate education and training using participant education, skills, interests, and personal and family circumstances as a guide. Access to training is critical to participants who are unemployed and in need of further educational skills.

Response Items:

- a) Describe how your agency will use assessment results to connect participants with appropriate education activities (e.g., adult basic education, General Equivalency Diploma [GED]/High School Equivalency Diploma [HSED], English as a Second Language [ESL], and adult literacy programs).
- b) For those in adult basic education, GED/HSED, ESL and adult literacy programs, describe how your agency will establish individualized educational goals and measure each participant's progress towards those goals. Include a description of the supports

your agency will provide to help participants succeed in reaching their education goals.

- c) Describe how participants' career interests, planning, and assessment information will be used to connect them with job skills training that build on their existing skills and aptitudes.
- d) Describe how your agency will identify existing job skills training opportunities and how your agency will coordinate with other public workforce providers to expand training opportunities, including providing assistance in obtaining financial aid.
- e) Describe how your agency will use the information gathered from the participant's experience in the assigned education and training activities to update the EP, SSI/SSDI Application/Documentation, and W-2 placement.
- f) Describe what staff, within your agency or within the broader workforce development/job center system, will assess individuals for education and training activities and what staff will provide those activities. Include in your response what experience and training qualifies them to perform these functions.

2.D.5 Transitioning Parents to SSI/SSDI

Summary:

The SSIA is required to provide services to support the smooth transition of participants moving from W-2 to SSI/SSDI.

Response Items:

- a) Describe how your agency will work with the participant to create a transition plan that identifies resources that will address personal and family related needs.

2.D.6 Integration of Services

2.D.6.1 Service Integration with the Public Workforce System

Summary:

W-2 and related programs must be connected to the Job Center system. In addition, W-2 Contract Agencies must establish and maintain effective relationships with other workforce system programs serving families in common. Integration of services across programs and providers will reduce duplication of effort across agency roles, and result in improved employment outcomes.

Response Items:

- a) Describe how your agency will connect to the Job Center system.
- b) Describe how your agency will collaborate with the following entities in order to maximize employment outcomes. Include in your response your agency's plan for collaborating with all identified service providers throughout the contract period:
 - Adult literacy providers;

- Adult job training administered by the Technical Colleges;
- Vocational rehabilitation administered by the Department of Workforce Development (DWD), DVR;
- Veteran’s Employment and Training;
- Community Action Program (CAP) Agencies; and
- Other local and regional business associations, community based organizations, and economic development programs

2.D.6.2 Service Integration with Other Work Support Service Providers

Summary:

W-2 participants are often connected to other local workforce support services. The SSIA is responsible for ensuring that those services are coordinated with the services being offered by the SSIA. To do this, the SSIA must establish and maintain effective relationships with other workforce support service providers serving families in common. Integration of services across programs and providers will reduce duplication of effort across agency roles, and result in improved employment outcomes.

Response Items:

- a) Describe how your agency will coordinate with the programs administered by the county or tribe, including FoodShare (FS), BadgerCare Plus (BC+), Medicaid, Child Support (CS) and Child Care administration.
- b) Describe how your agency will identify and collaborate with community resources and programs to provide workforce support services to assist W-2 participants in addressing family and work-related needs including:
 - CAP agencies;
 - Refugee employment and training programs, such as Voluntary Resettlement Agencies (VOLAGs), and Mutual Assistance Associations (MAAs), that provide job readiness and post employment services;
 - Other workforce support services that provide additional support focused on ensuring success in the workforce:
 - Federal Earned Income Tax Credit (EITC) and Wisconsin Earned Income Credit programs (WEITC);
 - Adult literacy services;
 - Transportation services;
 - Housing services;
 - Domestic violence services;

- Mental health services, including refugee mental health programs;
 - AODA services;
 - Emergency services; and
 - Other services including, volunteer organizations
- c) Describe how your agency will develop and maintain a working relationship with local Social Security Administration and Disability Determination Bureau (DDB).

2.D.6.3 Service Integration with Child Welfare Services

Summary:

W-2 and related programs must be integrated with child welfare services and child abuse and neglect prevention services.

Response Item:

- a) Describe how your agency will identify families currently receiving services from both W-2 and child welfare programs, and families who have received services from both programs during the past three months, although during that time period the services may not have been simultaneous from both programs.
- b) Describe how your agency will integrate services with child welfare services including child abuse and neglect prevention services, in home child welfare services, and out-of-home child welfare services for the families identified in question a) above. Include in your response how your agency will integrate services so that the W-2 EP is consistent, whenever possible, with the child welfare family case plan. Also describe how your agency staff will actively participate in coordinated service team meetings.
- c) Describe the process you will develop to share relevant assessments, and coordinate referrals to needed services, such as AODA, mental health, and other service providers. This includes ensuring that services provided by both systems are not duplicated.
- d) Describe what staff within your agency will coordinate/integrate W-2 and related programs services with child welfare services, and what experience and training qualifies them to perform these functions.

2.D.7 Quality Assurance/Improvement Monitoring

Summary:

The SSIA must implement an internal monitoring system to assure oversight of the agency's performance of W-2 and related programs. The oversight must include systematic identification and implementation of improvements needed, regular reviews of performance standards outcomes, and contract compliance, and timely notification to the BWF Contract Manager of performance problems.

Response Items:

- a) Describe your agency’s internal monitoring process to ensure compliance with the Department’s W-2 Program policies and procedures, and your agency’s approved W-2 and Related Programs Plan. Include what will be reviewed and the frequency of those reviews.
- b) Describe your agency’s plan to use information from your agency’s quality assurance/improvement monitoring process described above, from DCF monitoring, and from other sources such as customer feedback, complaints, Fact Finding process, etc. to assess agency performance and make improvements.
- c) Describe your agency’s plan to ensure that changes made to improve program delivery are effective. In addition, explain how your agency will provide this information to the Department.
- d) Describe how your agency will determine whether training for staff has achieved desired outcomes. Include in your response steps your agency will take to get additional training when needed.

2.D.8 Scenarios

Scenarios that follow include W-2 topics related to:

- Social Security Issues

Select one scenario from list below and respond in writing to the “Describe...” statement or “How...” question of each selected.

Respond to one of the following:

- a) Nancy Lexington: Nancy Lexington, divorced and 45 years old, has two children, ages 11 and 15. She had been employed by Morning Meadow Dairy for twenty years. About two years ago, on a day off from work, Nancy fell and injured her back. She has been trying to work through the pain, but it has become very difficult, in part because of all the pain medication she has been prescribed. Her doctor has told her that her condition is progressively worsening and has suggested she consider applying for SSDI. Describe how your agency would work with Nancy.
- b) Tulia Rios: Tulia Rios is a first time W-2 participant. She was assessed by the Eligibility and Assessment Agency and placed in the SSI-A with the following information: she is a 35-year-old single mother with children aged 17, 12 and 10 years. She reported that she has been diagnosed with Fibromyalgia and is unable to work with her hands or stand or walk for long periods of time. Tulia reports she has been “let go” from her last three jobs because of her inability to perform tasks at the level the employers wanted. She also missed a great deal of work when the pain was too intense. Her most recent job was terminated two months ago. She last saw a doctor three months ago, when she and her children still lived in Kentucky. The EAA was able to get supportive documentation from her past medical provider to confirm the diagnosis and prognosis and has her scheduled to go and see a new doctor in town. The family moved to Wisconsin because her mother lives here and her mother has offered to help Tulia with child care. Tulia has never

applied for Social Security Income (SSI), has no current advocate. Describe the services your agency would provide to Tulia.

2.D.9 Staff Access to W-2 Policy Resources

Summary:

The SSIA must establish procedures that ensure all staff who work with W-2 participants have a working knowledge of the W-2 Manual, all current Bureau of Working Families (BWF) Operations Memos, Division of Family and Economic Security (DFES) Administrators Memos, Client Assistance for Re-employment and Economic Support (CARES) Guide, and other informal communication released through the W-2 Regional Offices that pertain to W-2 case management. Agencies must further ensure that all W-2 staff are able to easily access these documents on an ongoing basis. *Note: With the exception of the regional office communication, these documents are all available on DCF's website.*

Response Items:

- a) Describe your procedures for ensuring that all staff have a working knowledge of existing policies and procedures found in the W-2 Manual, BWF Operations Memos and the CARES Guide. Include in this description your process for ensuring that staff become familiar with new policy materials released by the Department via manual releases and memos.
- b) Describe how the staff in your agency, who work with W-2 participants, will access the W-2 Manual, BWF Operations Memos, DFES Administrators Memos, and the CARES Guide.

2.D.10 W-2 Program Guarantees

Summary:

The W-2 and Related Programs Contract must be administered in accordance with all applicable laws, codes, policies and procedures. All Proposers must complete Form 11, W-2 Program Guarantees, found in this Request for Proposal (RFP). By completing the form, you are agreeing that you will comply with all applicable laws, codes, policies and procedures of which you receive notice, including, but not limited to, those found in the following documents:

Wisconsin Statutes	Administrator's Memos
Wisconsin Administrative Code	Income Maintenance Manual (IMM)
W-2 Manual	Child Care Manual
CARES Guide	Other written departmental guidance
Operations Memos	

In addition, W-2 Contract Agencies must have written procedures available for review by the Department upon request.

Response Items:

- a) Proposers must complete and sign Form 11, W-2 Program Guarantees, found in this RFP.