

# Oregon Integrated Supported Employment/Education Fidelity Scale: Version 1 September 2017

**Rater:**

**Site:**

**Date:**

**Total Score:**

**Directions:** Circle one anchor number for each criterion.

**Key: SEd Combined with IPS**

**Parallel to IPS**

**Changed from IPS (measure, meaning or service)**

<u>Criterion</u>	<u>Data Source</u>	<u>Anchor</u>
<b>STAFFING</b>		
<p><b>1. Caseload Size:</b> Employment (SE) / Education (SEd) specialists have individual employment/education caseloads. The maximum caseload for any full-time SE/SEd specialist is 20 or fewer clients.</p>	<p>MIS, DOC, INT</p>	<p>1= Ratio of 41 or more clients per specialist                      2= Ratio of 31-40 clients per specialist                      3= Ratio of 26-30 clients per specialist                      4= Ratio of 21-25 clients per specialist                      5= Ratio of 20 or fewer clients per specialist</p>
<p><b>2. Employment/Education Services Staff:</b> SE/SEd specialists provide only employment and/or education services.</p>	<p>MIS, DOC, INT</p>	<p>1= Specialists provide SE/SEd services less than 60% of the time                      2= Specialists provide SE/SEd services 60-74% of the time                      3= Specialists provide SE/SEd services 75-89% of the time                      4= Specialists provide SE/SEd services 90-95% of the time                      5= Specialists provide SE/SEd services 96% or more of the time</p>
<p><b>3. Vocational Generalists- Supported Employment:</b> Each employment specialist carries out all phases of employment service, including intake, engagement, assessment, job placement, job coaching, and follow-along supports before step down to less intensive employment support from another MH practitioner. (Note: It is not expected that each employment specialist will provide</p>	<p>MIS, DOC, INT, OBS</p>	<p>1= Only provides vocational referral services to vendors and other programs                      2= Maintains caseload but refers clients to other programs for vocational services                      3= Provides one to four phases of the employment services</p>

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benefits counseling to their clients. Referrals to a highly trained benefits counselor are keeping with high fidelity, see Item #1 in “Services”.)

**3. Education Generalists- Supported Education:** Each education specialist carries out all phases of education services, including intake, engagement, assessment, placement in educational settings, follow along supports, achievement of educational goals. Education support does not include extensive training or tutoring being provided directly by the education specialist.

4= Provides five phases of employment service but not the entire service  
 5= Carries out all six phases of employment service (e.g. program intake, engagement, assessment, job development/job placement, job coaching, and follow-along supports).

1= Only provides educational referral services to vendors and other programs.  
 2= Provides 1 - 2 phases  
 3= Provides 3 - 4 phases  
 4= Provides five phases of educational service but not the entire service.  
 5= Carries out all six phases of the education service (e.g. program intake, engagement, assessment, development of relationship with educational services, linkage to educational services, and follow along supports).

## ORGANIZATION

**1. Integration of Rehabilitation with Mental Health Treatment Thru Team Assignment:** SE/SEd specialists are part of up to 2 mental health treatment teams from which at least 90% of the employment/education specialist's caseload is comprised.

MIS, DOC,  
INT, OBS

1= Specialists are part of a program that functions separately from the mental health treatment team.  
 2= Specialists are attached to three or more mental health treatment teams. OR Clients are served by individual mental health practitioners who are not organized into teams. OR Specialists are attached to one or two teams from which less than 50% of the specialist's caseload is comprised.  
 3= Specialists are attached to one or two mental health treatment teams, from which at least 50 -74% of the specialist's caseload is comprised.  
 4= Specialists are attached to one or two mental health treatment teams, from which at least 75-89% of the specialist's caseload is comprised.  
 5= Specialists are attached to one or two mental health treatment teams, from which at least 90-100% of the specialist's caseload is comprised.

**2. Integration of Rehabilitation with Mental Health**

MIS, DOC,

1= One or none is present

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### Treatment Thru Frequent Team Member Contact:

SE/SEd specialists actively participate in weekly mental health treatment team meetings (not replaced by administrative meetings) that discuss individual clients and their employment goals with shared decision-making. SE/SEd Specialist's office is in close proximity to (or shared with) their mental health treatment team members. Documentation of mental health treatment and employment/education services are integrated in a single client chart. SE/SEd Specialists help the team think about employment/education for people who haven't yet been referred to supported employment/education. SE/SEd Specialists attends weekly mental health treatment team meetings.

INT, OBS

- 2= Two are present
- 3= Three are present
- 4= Four are present
- 5= Five are present

### All Five Key Components are Present:

- SE/SEd specialist attends weekly mental health treatment team meetings.
- SE/SEd specialist participates actively in treatment team meetings with shared decision-making.
- SE/SEd services documentation (i.e., vocational/educational assessment/profile, employment/education plan, progress notes) is integrated into client's mental health treatment record.
- SE/SEd specialist's office is in close proximity to (or shared with) their mental health treatment team members.
- SE/SEd specialist helps the team think about employment/education for people who haven't been referred to supported employment/education.

**3. Collaboration between SE/SEd Specialists and Vocational Rehabilitation Counselors:** The SE/SEd specialists and VR counselors have frequent contact for the purpose of discussing shared clients and identifying potential referrals.

DOC, INT,  
OBS, ISP

- 1= Specialists and VR counselors have client-related contacts (phone, e-mail, in person) less than quarterly to discuss shared clients and referrals. OR specialists and VR counselors do not communicate
- 2= Specialists and VR counselors have client-related contacts (phone, e-mail, in person) at least quarterly to discuss shared clients and referrals.
- 3= Specialists and VR counselors have client-related contacts (phone, e-mail, in person) at least monthly to discuss shared clients and referrals.
- 4= Specialists and VR counselors have scheduled, face to face meetings at least quarterly, OR have client related contacts (phone, e-mail, in person) weekly to discuss shared clients and referrals.
- 5= Specialists and VR counselors have scheduled, face to face meetings at least monthly and have client related contacts (phone, e-mail, in person)

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**4. SE/SEd Unit:** At least 2 full-time SE/SEd specialists and a team leader comprise the SE/SEd unit. They have weekly client-based supervision following the SE/SEd model in which strategies are identified and job leads, educational interventions and resources are shared. They provide coverage for each other's caseload when needed.

MIS, INT,  
OBS

weekly to discuss shared clients and referrals.

- 1= SE/SEd specialists are not part of a unit.
- 2= SE/SEd specialists have the same supervisor but do not meet as a group. They do not provide back-up services for each other's caseload.
- 3= SE/SEd specialists have the same supervisor and discuss clients between each other on a weekly basis. They provide back-up services for each other's caseloads as needed. OR, If a program is in a rural area where SE/SEd specialists are geographically separate with one SE/SEd specialist at each site, the SE/SEd specialists meet 2-3 times monthly with their supervisor by teleconference.
- 4= At least 2 SE/SEd specialists and a team leader form a unit with 2-3 regularly scheduled meetings per month for client-based group supervision in which strategies are identified and job leads, educational interventions and resources are shared. They provide coverage for each other's caseloads when needed. OR, If a program is in a rural area where SE/SEd are geographically separate with one SE/SEd specialist at each site, the SE/SEd specialists meet 2-3 times per month with their supervisor in person or by teleconference and mental health practitioners are available to help the SE/SEd specialist with activities such as taking someone to work/school or picking up job/school applications.
- 5= At least 2 full time SE/SEd specialists and a team leader form a unit with weekly client-based group supervision based on the SE and SEd model in which strategies are identified and job leads, educational interventions and resources are shared. They provide coverage for each other's caseloads when needed.

**5. Role of SE/SEd Supervisor:** Supported employment/education unit is led by a supported employment/education team leader. Employment/education specialists' skills are developed and improved through outcome-based supervision. All five key roles of the employment/education

MIS, INT,  
DOC, OBS

- 1= One or none is present
- 2= Two are present
- 3= Three are present
- 4= Four are present

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supervisor are present.

5= Five are present

### Five key roles of the supervisor related to employment and education:

- One full-time equivalent (FTE) supervisor is responsible for no more than 10 SE/SEd specialists. The supervisor does not have other supervisory responsibilities (Program leaders supervising fewer than 10 SE/SEd specialists may spend a percentage of a time on other supervisory activities on a prorated basis. For example, a supervisor responsible for 4 SE/SEd specialists may be devoted to SE/SEd supervision half time).
- Supervisor conducts weekly supported employment/education supervision designed to review client situations and identify new strategies and ideas to help clients in their work/education lives.
- Communicate with mental health services supervisors quarterly to ensure that services are integrated, to problem solve programmatic issues (such as referral process, or transfer of follow-along to mental health workers) and to be a champion for the value of work/education.
- Accompany SE/SEd specialists, who are new or having difficulty with SE/SEd skills, in the field monthly to improve skills by observing, modeling, and giving feedback on skills, e.g., meeting employers for job development or meeting educational personnel.
- Supervisor reviews current client outcomes with employment/education specialists and sets goals to improve program performance at least quarterly.

**6. Zero Exclusion Criteria SE/SEd:** All clients interested in working/education have access to supported employment/supported education services regardless of readiness factors, substance abuse, symptoms, history of violent behavior, cognition impairments, treatment non-adherence, and personal presentation. These apply during SE/SEd services too. SE/SEd specialists offer to help with another job/educational goal when one has ended, regardless of the reason for the job/educational experience ending or number of

DOC, INT,  
OBS

- 1= There is a formal policy to exclude clients due to lack of job/educational readiness (e.g., substance abuse, symptoms, history of violent behavior, cognition impairments, treatment non-adherence, and personal presentation, etc.)
- 2= Most clients are unable to access SE/SEd services due to perceived lack of job/educational readiness (e.g., substance abuse, symptoms, history of violent behavior, cognition impairments, treatment non-adherence, and

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jobs/educational experiences held/attended. If VR has screening criteria, the mental health agency does not use them to exclude anybody. Clients are not screened out formally or informally.

personal presentation, etc.)

- 3= Some clients are unable to access SE/SEd services due to perceived lack of job/educational readiness (e.g., substance abuse, symptoms, history of violent behavior, cognition impairments, treatment non-adherence, and personal presentation, etc.)
- 4= No evidence of exclusion, formal or informal. Referrals are not solicited by a wide variety of sources. SE/SEd specialists offer to help with another job/educational opportunity when one has ended, regardless of the reason that the job/educational opportunity ended or number of jobs/educational opportunities held/attended.
- 5= All clients interested in working/education have access to SE/SEd services. Mental health practitioners encourage clients to consider employment/education, and referrals for supported employment/supported education are solicited by many sources. SE/SEd specialists offer to help with another job/educational opportunity when one has ended, regardless of the reason that the job/educational opportunity ended or number of jobs/educational opportunities held/attended.

## 7. Agency Focus on Competitive Employment and

Education: Agency promotes employment/education through multiple strategies. Agency intake includes questions about interest in employment/education. Agency displays written posters (e.g., brochures, bulletin boards, posters) about employment/education and supported employment/supported education services. The focus should be with the agency programs that provide services to adults with severe mental illness. Agency supports ways for clients to share work/education stories with other clients and staff. Agency measures rate of employment/education outcomes and goal achievement, as well as progress working towards these goals, and shares this information with agency leadership and staff.

DOC, INT  
OBS

- 1= One or none is present
- 2= Two are present
- 3= Three are present
- 4= Four are present
- 5= Five are present

Agency promotes competitive work and education through multiple strategies:

- Agency intake includes questions about interest in employment/education.
- Agency includes questions about interest in employment/education on all annual (or semi-annual) assessments or treatment plan reviews.
- Agency displays written postings (e.g., brochures, bulletin boards, posters) about working/education and SE/SEd services, in lobby and other waiting

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**8. Executive Team Support For SE/SEd:** Agency executive team members assist with SE/SEd implementation and sustainability.

DOC, INT  
OBS

areas.

- Agency supports ways for clients to share work/education stories with other clients and staff (e.g., agency-wide employment recognition events, in-service trainings, peer support groups, agency newsletter articles, invited speakers at clients treatment groups, etc.,) at least twice a year.
- Agency measures rate of competitive employment/educational outcomes (enrollment), on at least a quarterly basis and shares outcomes with agency leadership and staff.

1= One or none is present

2= Two are present

3= Three are present

4= Four are present

5= Five are present

All five components of executive team support are present:

- Executive Director and Clinical Director demonstrate knowledge regarding the principles of SE and SEd.
- Agency QA process includes an explicit review of the SE/SEd program, or components of the program, at least every 6 months through the use of the SE/SEd fidelity scale or until achieving high fidelity, and at least yearly thereafter.
- At least one member of the executive team actively participates at SE/SEd leadership team meetings (steering committee meetings) that occur at least every six months for high fidelity programs and at least quarterly for programs that have not yet achieved high fidelity. Steering committee is defined as a diverse group of stakeholders charged with reviewing fidelity, program implementation, and the service delivery system. Committee develops written action plans aimed at developing or sustaining high fidelity services.

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- The agency CEO/Executive Director communicates how SE /SEd services support the mission of the agency and articulates clear and specific goals for SE/SEd to all agency staff during the first six months at least annually (i.e., SE/SEd kickoff, all-agency meetings, agency newsletters, etc.). This item is not delegated to another administrator.

- SE/SEd program leader shares information about barriers and facilitators with the executive team (including the CEO) at least twice each year. The executive team helps the program leader identify and implement solutions to barriers.

### SERVICES

**1. Work Incentive Planning:** All clients are offered assistance in obtaining comprehensive, individualized, work incentives planning before starting a new job and assistance accessing work incentives planning thereafter when making decisions about changes in work hours and pay. Work incentives planning includes SSA benefits, medical benefits, medication subsidies, housing subsidies, food stamps, spouse and dependent children benefits, and any other source of income. Clients are provided information and assistance about reporting earnings to SSA, housing programs, VA programs, etc., depending on the person's benefits.

DOC, INT,  
OBS, ISP

- 1= Work incentives planning is not readily available or easily accessible to most clients served by the agency.
- 2= SE/SEd specialist gives client contact information about where to access information about work incentives planning.
- 3= SE/SEd specialist discusses with each client changes in benefits based on work status.
- 4= SE/SEd specialist or other MH practitioner offer clients assistance in obtaining comprehensive, individualized work incentives planning by a person trained in work incentives planning prior to client starting a job.
- 5= SE/SEd specialist or other MH practitioner offer clients assistance in obtaining comprehensive, individualized work incentives planning by a specially trained work incentives planner prior to starting a job. They also facilitate access to work incentives planning when clients need to make decisions about changes in work hours and pay. Clients are provided information and assistance about reporting earnings to SSA, housing programs, etc., depending on the person's benefits.

**1. Educational Financial Planning:** In addition to the above, loan forgiveness, financial aid, educational based benefits planning, loan re-payment planning, scholarship applications and impact on finances for SSI/SSDI, pass plans, IDAs etc.

- 1= Financial aid planning is not readily available or easily accessible to most clients served by the agency.
- 2= SEd specialist gives client contact information about where to access



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**2. Disclosure:** SE/SEd specialists provide clients with accurate information and assist with evaluating their choices to make an informed decision regarding what is revealed to the employer, educational institutions, educational staff, and peers about having a disability.

DOC, INT,  
OBS

- information about work incentives/educational financial planning.
- 3= The SEd specialist discusses educational financial planning with each client.
  - 4= SEd specialist or other MH practitioner offer clients assistance in obtaining comprehensive individualized educational financial planning by a person trained in educational financial planning prior to client enrolling in an educational program.
  - 5= SEd specialist or other expert provides clients assistance with educational financial planning that includes loan forgiveness, financial aid, educational based benefits planning, loan re-payment planning, scholarship applications and impact on finances for SSI/SSDI, pass plans, IDAs etc. Clients are provided information and assistance about how their educational plans may impact other services received.

- 1= None is present
- 2= One is present
- 3= Two are present
- 4= Three are present
- 5= Four are present

- SE/SEd specialists do not require all clients to disclose their psychiatric disability at the work/education site in order to receive services.
- SE/SEd specialists offer to discuss with clients the possible costs and benefits (pros and cons) of disclosure at the work/education site in advance of clients disclosing at the work/education site. SE/SEd specialists describe how disclosure relates to requesting accommodations and the SE/SEd specialist's role communicating with the employer/educational institution.
- SE/SEd specialists discuss specific information to be disclosed (e.g., disclose receiving mental health treatment, or presence of a psychiatric disability, or difficulty with anxiety, or unemployed for a period of time, etc.)

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**3. Ongoing, Work Based Vocational Assessment:** Initial vocational assessment occurs over 2-3 sessions and is updated with information from work experiences in competitive jobs. A vocational profile form that includes information about preferences, experiences, skills, current adjustment, strengths, personal contacts, etc., is updated with each new job experience.

DOC, INT,  
OBS, ISP

and offers examples of what could be said to employers/educators.

- SE/SEd specialists discuss disclosure on more than one occasion (e.g., if clients have not found employment after two months or if clients report difficulties on the job or in an educational setting).

- 1= Vocational evaluation is conducted prior to job placement with emphasis on office-based assessments, standardized tests, intelligence tests, work samples.
- 2= Vocational assessments may occur through a stepwise approach that includes: prevocational work experiences (e.g., work units in a day program), volunteer jobs, or set aside jobs (e.g., NISH jobs, agency-run businesses, sheltered workshop jobs, affirmative businesses, enclaves).
- 3= SE specialists assist clients in finding competitive jobs directly without systematically reviewing interests, experiences, strengths, etc. and do not routinely analyze job loss (or job problems) for lessons learned.
- 4= Initial vocational assessment occurs over 2-3 sessions in which interests and strengths are explored. SE specialists help clients learn from each job experience and also work with the treatment team to analyze job loss, job problems and job successes. They do not document these lessons learned in the vocational profile, OR the vocational profile is not updated on a regular basis.
- 5= Initial vocational assessment occurs over 2-3 sessions and information is documented on a vocational profile form that includes preferences, experiences, skills, current adjustment, strengths, personal contacts, etc. The vocational profile form is used to identify job types and work environments. It is updated with each new job experience. Aims at problem solving using environmental assessments and consideration of reasonable accommodations. Sources of information include the client, treatment team, clinical records, and with the client's permission, from family members and previous employers. SE specialists help clients learn from each job experience and also work with the treatment team to analyze job loss, job problems and job successes.

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**3. Ongoing Educational Assessment:** Initial educational assessment occurs over 2-3 sessions and is updated with information from educational experiences at educational settings. An educational profile form that includes information about preferences, experiences, barriers to learning, skills, current adjustment, strengths, natural supports, etc., is updated with each new educational experience.

- 1= Educational evaluation is conducted prior to education placement with emphasis on office-based assessments, standardized tests, and intelligence tests.
- 2= Educational assessments may occur through a stepwise approach that forces pre-educational segregated environments/classes.
- 3= SEd specialists assist clients in engaging in educational activities directly without systematically reviewing interests, experiences, strengths, etc. and do not routinely analyze educational endings for lessons learned.
- 4= Initial educational assessment occurs over 2-3 sessions in which interests and strengths are explored. SEd specialists help client learn from each education experience and also work with the treatment team to analyze education problems and education successes. They do not document these lessons learned in the educational profile, OR the educational profile is not updated on a regular basis.
- 5= Initial educational assessment occurs over 2-3 sessions and information is documented on an educational profile form that includes preferences, experiences, skills, current adjustment, strengths, personal contacts, etc. The educational profile form is used to identify types of educational activities. It is updated with each new education experience. Aims at problem solving using environmental assessments and consideration of reasonable accommodations. Sources of information include the client, treatment team, clinical records, and with the client's permission, family members and previous educators. SEd specialists help clients learn from each education experience and also work with the treatment team to analyze education problems and education successes.

**4. Rapid Job Search:** Initial employment assessment and first face-to-face employer contact by the client or the SE specialist about a competitive job occurs within 30 days (one month) after program entry. First face-to-face contact with an employer by the client or the SE specialist about a competitive job or paid internships is on average:

DOC, INT,  
OBS, ISP

- 1= 271 days or more (>9 mos.) after program entry.
- 2= Between 151 and 270 days (5-9 mos.) after program entry.
- 3= Between 61 and 150 days (2-5 mos.) after program entry.
- 4= Between 31 and 60 days (1-2 mos.) after program entry.
- 5= Within 30 days (one month) after program entry.

**4. Rapid Linkage To Educational Activities:** Initial

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educational assessment and first face- to-face contact by the client or the SEd specialists about educational activities occurs within 30 days (on month) after program entry. First face-to-face contact with a mainstream educational program by the client or the SEd specialist is on average:

- 1= 271 days or more (>9 mos.) after program entry.
- 2= Between 151 and 270 days (5-9 mos.) after program entry.
- 3= Between 61 and 150 days (2-5 mos.) after program entry.
- 4= Between 31 and 60 days (1-2 mos.) after program entry.
- 5= Within 30 days (one month) after program entry.

**5. Individualized Job Search:** Employment specialists make employer contacts aimed at making a good job match based on clients' preferences (relating to what each person enjoys and their personal goals) and needs (including experience, ability, symptomatology, health, etc.,) rather than the job market (i.e., those jobs that are readily available). An individualized job search plan is developed and updated with information from the vocational assessment/profile form and new job/educational experiences. The percentage of employer contacts by the SE specialist are based on job choices which reflect client's preferences, strengths, symptoms, etc. rather than the job market:

DOC, INT,  
OBS, ISP

- 1= Less than 25% of the time
- 2= 25-49% of the time
- 3= 50-74% of the time
- 4= 75-89% of the time
- 5= 90-100% of the time. When clients have limited work experience, SE specialists provide information about a range of job options in the community.

**5. Individualized Pre-Enrollment Planning and Services:** An individualized educational plan is developed and updated with information from the educational assessment/profile form and new educational activities/jobs. SEd specialist provides comprehensive services to prepare and enroll students based on their preferences. Services include but are not limited to goal exploration, orientation to educational setting and resources, financial aid, enrollment, securing accommodations if desired.

- 1= Less than 25% of the time
- 2= 25-49% of the time
- 3= 50-74% of the time
- 4= 75-89% of the time
- 5= 90-100% of the time. When clients have limited education experience, SEd specialists provide information about a range of educational options in the community.

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## **6. Job Development: Frequent Employer Contact:**

(prorated according to the % of clients who are seeking employment on caseloads): Each employment specialist makes at least 6 face to face employer contacts per week on behalf of clients looking for work. The number of face-to-face employer contacts made by the SE specialist that are client-specific per week is:

- DOC, INT
- 1= Less than 2
  - 2= 2, OR does not have a process for tracking.
  - 3= 4, and a tracking form is reviewed by the SE supervisor on a monthly basis.
  - 4= 5, and a tracking form are reviewed by the SE supervisor on a weekly basis.
  - 5= 6 or more, or 2 employer contacts times the number of people looking for work when there are less than 3 people looking for work on their caseload (e.g., new program). A tracking form is reviewed by the SE/SEd supervisor on a weekly basis.

## **6. Educational Development: Frequent Educational**

**Resource Contact:** (prorated according to the % of clients who are seeking education on caseloads): Each SEd specialist makes at least 6 face to face educational resource contacts per month on behalf of clients seeking education. The number of face-to-face education resource contacts made by the SEd specialist that are client-specific per month is:

- 1= Less than 2
- 2= 2, OR does not have a process for tracking.
- 3= 4, and a tracking form is reviewed by the SEd supervisor on a monthly basis.
- 4= 5, and a tracking form are reviewed by the SEd supervisor on a monthly basis.
- 5= 6 or more, or 2 education program contacts times the number of people looking for educational programs when there are less than 3 people looking for educational programs on their caseload (e.g., new program). A tracking form is reviewed by the SEd supervisor on a weekly basis.

## **7. Job Development: Quality Of Employer Contact:**

Employment specialists build relationships with employers through multiple visits in person that are planned to learn the needs of the employer, convey what the SE program offers to the employer, describe client strengths that are a good match for the employer.

- DOC, INT,  
OBS
- 1= Meets employer when helping client to turn in job applications, OR SE specialist rarely makes employer contacts.
  - 2= Contacts employers to ask about job openings and then shares these “leads” with clients.
  - 3= Follows up with advertised job openings by introducing self, describing program, and asking employer to interview client.

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**7. Educational Resource Development:** Quality of collaboration with outside educational institutions, programs and organizations: Education specialists build relationships with educational institutions and settings through multiple visits in person.

- 4= Meets with employers in person whether or not there is a job opening, advocates for client by describing strengths and asks employers to interview client.
- 5= Builds relationships with employers through multiple visits in person that are planned to learn the needs of the employer, convey what the SE program offers to the employer, describe client strengths that are a good match for the employer.

- 1= Meets educators when helping client to turn in applications for enrollment, OR rarely makes education contacts.
- 2= N/A
- 3= Contacts educators to ask about educational programs and then shares these “leads” with client.
- 4= N/A
- 5= SEd specialist builds relationships with educational resources through multiple visits in person that are planned to learn more about the resource, conveys what the SEd program offers, and describes and introduces a student to the resource when there is a match.

**8. Diversity Of Job Types/Educational Participation:** SE/SEd specialists assist clients in obtaining different types of jobs. SE/SEd specialists assist clients in participating in a variety of educational programs, majors, paid internships, certificates, and work study programs.

DOC, INT,  
OBS, ISP

- 1= Less than 50% of the time.
- 2= 50-59% of the time.
- 3= 60-69% of the time.
- 4= 70-84% of the time.
- 5= 85-100% of the time.

**9. Diversity of Employers:** Employment specialists assist clients in obtaining jobs and paid internships with different employers. SE specialists assist clients in obtaining jobs and internships with different employers.

DOC, INT,  
OBS, ISP

- 1= Less than 50% of the time.
- 2= 50-59% of the time.
- 3= 60-69% of the time.

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**9. Educational Progress:** Education specialists strongly encourage clients to achieve positive, forward educational progress. Clients move to increasingly higher levels of educational experiences with each academic unit.

- 4= 70-84% of the time.
- 5= 85-100% of the time.

- 1= 0-19% of clients move actively to increasingly higher levels of educational experiences.
- 2= 20-49% of clients move actively to increasingly higher levels of educational experiences.
- 3= 50-79% of clients move actively to increasingly higher levels of educational experiences.
- 4= 80-89% of clients move actively to increasingly higher levels of educational experiences.
- 5= 90-100% of clients move actively to increasingly higher levels of educational experiences.

**10. Competitive Jobs And Paid Internships:** Employment specialists provide competitive job options and paid internship options. Competitive jobs pay at least minimum wage, are jobs that anyone can apply for and are not set aside for people with disabilities. Paid internships are those that anyone can apply for. SE specialists provide options for permanent, competitive jobs and paid internships in competitive job settings. (Seasonal jobs and job from temporary agencies that other community members use are counted as competitive jobs.)

DOC, INT,  
OBS, ISP

- 1= Less than 64% of the time, OR there are fewer than 10 current jobs.
- 2= 65-74% of the time.
- 3= 75-84% of the time.
- 4= 85-94% of the time.
- 5= 95% or more of the time.

**10. Mainstream Educational Programs:** Education specialists provide linkage to educational programs that are open to the entire community and are not limited to people with disabilities or people with severe mental illness. SEd specialists provide options for mainstream educational programs

- 1= Less than 64% of the time.
- 2= 65-74% of the time.
- 3= 75-84% of the time.
- 4= 85-94% of the time.
- 5= 95% or more of the time.

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### **11. Individualized Follow Along Supports Supported**

**Employment:** Clients receive different types of support for working a job or internship that are based on the job/internship, client preferences, work history, needs, etc., Supports are provided by a variety of people, including treatment team members, family, friends, co-workers, and employment specialists. Employment specialists also provide employer support at client request. Employment specialist offers help with career development, i.e., opens client to educational services, helps client find a more desirable job, or more preferred job duties.

DOC, INT,  
OBS, ISP

- 1= Most clients do not receive supports after starting a job
- 2= About half of the working clients receive a narrow range of supports provided primarily by the SE specialist
- 3= Most working clients receive a narrow range of supports that are provided primarily by the SE specialist
- 4= Clients receive different types of support for working a job that are based on the job, client preferences, work history, needs, etc. SE specialists provide employer supports at the client's request.
- 5= Clients receive different types of support for working a job that are based on the job, client preferences, work history, needs, etc. SE specialist also provides employer support (e.g., educational information, job accommodations) at client's request. The SE specialist helps people move on to more preferable jobs. The site provides examples of different types of support including enhanced supports by treatment team members.

### **11. Individualized Follow-Along Supports Supported**

**Education:** Clients receive different types of support for engaging in educational experiences that are based on the educational goal, client preferences, educational history, needs, etc. Supports are provided by a variety of people, including treatment team members, family, friends, peers, and education specialists. Education specialists also provide support to those working in educational settings at client's request. Education specialist offers help with career development, i.e., opens client to employment services, or helps client find a more desirable educational experience.

- 1= Most clients do not receive supports after starting an educational program.
- 2= About half of the clients engaged in educational experiences receive a narrow range of supports provided primarily by the SEd specialist.
- 3= Most clients in educational experiences receive a narrow range of supports that are provided primarily by the SEd specialist.
- 4= Clients receive different types of educational support that are based on the educational setting, client preferences, educational history, needs, etc. SEd specialists provide educator supports at the client's request.
- 5= Clients receive enrollment supports including assistance applying for financial aid, selecting classes, and registering for classes. Clients receive different types of educational support that are based on the educational setting, client preferences, education history, needs, etc. (for example, connections to tutors and requesting academic accommodations). SEd specialist also provides educator support at client's request. The SEd



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specialist helps people move on to more preferable educational opportunities. The site provides examples of different types of support including enhanced supports by treatment team members.

## **12. Time-Unlimited Follow Along Supports- Supported**

**Employment:** Employment specialists have face-to-face contact within 1 week before starting a job, within 3 days after starting a job, weekly for the first month, and at least monthly for a year or more, on average, after working steadily, and desired by clients. Clients are transitioned to step down job supports from a mental health worker following steady employment. Employment specialist contacts clients within 3 days of learning about a job loss. SE specialist has face to face contact:

DOC, INT,  
OBS, ISP

### SE specialist has face to face contact:

- 1= Rarely or never
- 2= With less than half of the working clients for at least 4 months after starting a job.
- 3= With at least half of the clients for at least 4 months after starting a job.
- 4= With working clients weekly for the first month after starting a job, and at least monthly for a year or more, on average, after working steadily, and desired by clients.
- 5= With clients within 1 week before starting a job, within 3 days after starting a job, weekly for the first month, and at least monthly for a year or more, on average, after working steadily and desired by clients. Clients are transitioned to step down job supports, from a mental health worker following steady employment. SE specialist contacts clients within 3 days of hearing about the job loss.

## **12. Time-Unlimited Follow Along Supports- Supported**

**Education:** Education specialists have face-to-face contact within 1 week before starting an educational experience, within 3 days after starting an educational experience, weekly for the first month, and at least monthly for a year or more, on average, after engaging in educational experiences steadily, and desired by clients. Clients are transitioned to step down education supports from a mental health worker following steady pursuit of educational experiences. Education specialist contacts clients within 3 days of learning about a drop-out from educational experiences. SEd specialist has face to face contact:

### SEd specialist has face to face contact:

- 1= Rarely or never.
- 2= With less than half of the clients for at least 4 months after starting an educational experience.
- 3= With at least half of the clients for at least at enrollment, midterm, and final exams after starting an educational experience.
- 4= With clients weekly for the first month after starting an educational experience, and at least monthly for a year or more, on average, after being engaged in educational experiences steadily, and desired by client.
- 5= With enrolled clients within 1 week before starting an educational experience, within 3 days after starting an educational experience, weekly for the first month, and at least monthly for a year or more, on

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average, after being engaged in educational experiences steadily and desired by client. Clients are transitioned to step down education supports from a mental health worker for clients steadily engaged in educational experiences. SEd specialist contacts clients within 3 days of hearing about the ending of an educational experience.

### 13. Community-Based Services SE/SEd:

Employment/education services such as engagement, job finding/linkage to educational settings and follow-along supports are provided in natural community settings by all SE/SEd specialists. The percentage of scheduled work hours dedicated to employment/education by the SE/SEd specialist spent in the community is:

DOC, INT, OBS	1= 30% or less 2= 30-39% 3= 40-49% 4= 50-64% 5= 65% or more
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**14. Assertive Engagement And Outreach SE/SEd:** Service termination is not based on missed appointments or fixed time limits. Systematic documentation of outreach attempts. Engagement and outreach attempts made by integrated team members. Multiple home/community visits. Coordinated visits by employment/education specialist with integrated team member. Connect with family, when applicable. Once it is clear that the client no longer wants to work/pursue school or continue SE/SEd services, the team stops outreach. Evidence exists for the following number of strategies for engagement and outreach for employment/education:

MIS, DOC, INT, OBS	1= 2 or less 2= 3 3= 4 4= 5 5= 6
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#### Six Strategies for Engagement and Outreach:

- Service termination is not based on missed appointments or fixed time limits.
- Systematic documentation of outreach attempts.
- Engagement and outreach attempts made by integrated team members.
- Multiple home/community visits.
- Coordinated visits by SE/SEd specialist with integrated team member.
- Connect with family, when applicable.

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<b>Supported Employment/Education Score Sheet</b>				
<b>Staffing</b>	<b>Item</b>	<b>IPS</b>	<b>SEd</b>	<b>Combined Score</b>
	1. Caseload size	Score:	Score:	Score:
	2. Employment/Education services staff	Score:	Score:	Score:
	3. IPS- Vocational generalists	Score:		Score:
	3. SEd- Education generalist		Score:	
<b>Org.</b>	<b>Item</b>	<b>IPS</b>	<b>SEd</b>	<b>Combined Score</b>
	1. Integration of rehabilitation with mental health thru team assignment	Score:	Score:	Score:
	2. Integration of rehabilitation with mental health thru frequent team member contact	Score:	Score:	Score:
	3. Collaboration between employment/education specialists and Vocational Rehabilitation counselors	Score:	Score:	Score:
	4. SE/SEd unit	Score:	Score:	Score:
	5. Role of employment/education supervisor	Score:	Score:	Score:
	6. Zero exclusion criteria- SE & SEd	Score:	Score:	Score:
	7. Agency focus on competitive employment and education	Score:	Score:	Score:
	8. Executive team support for SE/SEd	Score:	Score:	Score:

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Services	Item	IPS	SEd	Combined Score
	1. Work incentives planning	Score:	Score:	Score:
	1. Educational Financial Planning		Score:	
	2. Disclosure	Score:	Score:	Score:
	3. Ongoing, work-based vocational assessment	Score:		Score:
	3. Ongoing educational assessment		Score:	
	4. Rapid search for competitive job	Score:		Score:
	4. Rapid linkage to educational activities		Score:	
	5. Individualized job search	Score:		Score:
	5. Individualized pre-enrollment planning and services		Score:	
	6. Job development—Frequent employer contact	Score:		Score:
	6. Educational development- Frequent educational resource contact		Score:	
	7. Job development—Quality of employer contact	Score:		Score:
	7. Educational resource development		Score:	
	8. Diversity of job types/educational participation	Score:	Score:	Score:
	9. Diversity of employers	Score:		Score:
	9. Educational Progress		Score:	

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	10. Competitive jobs	Score:		Score:
	10. Mainstream educational programs		Score:	
	11. IPS- Individualized follow-along supports	Score:		Score:
	11. SEd- Individualized follow-along supports		Score:	
	12. IPS- Time-unlimited follow-along supports	Score:		Score:
	12. SEd- Time-unlimited follow-along supports		Score:	
	13. Community-based services- SE & SEd	Score:	Score:	Score:
	14. Assertive engagement and outreach by integrated treatment team- SE & SEd	Score:	Score:	Score:
	<b>Total:</b>	Score:	Score:	Score:

115 – 125 = Exemplary Fidelity

100 - 114 = Good Fidelity

74 – 99 = Fair Fidelity

73 and below = Not Supported Employment/Education