

- STANDARD AGREEMENT AMENDMENT

STD. 213 A (Rev 9/01)

<input type="checkbox"/> CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED	Pages _____	AGREEMENT NUMBER 23781	AMENDMENT NUMBER 1
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- This Agreement is entered into between the State Agency and Contractor named below:
STATE AGENCY'S NAME
Department of Rehabilitation
CONTRACTOR'S NAME
County of San Mateo
- The term of this Agreement is: **July 1, 2002** through **September 30, 2003**
- The maximum amount of this Agreement is: **\$432,193.00** F.Y. 02/03 - **\$334,852.00**, F.Y. 2003/2004 - **\$97,341.00**
- The parties mutually agree to this amendment as follows. All actions noted below are by this reference made a part of the Agreement and incorporated herein:

The attached revised Exhibit A, Service Budget (DR 801A) and Service Budget Narrative hereby replaces the Exhibit A, Service Budget (DR801A) and Service Budget Narrative.

This amendment is effective January 1, 2003.

All other terms and conditions shall remain the same.

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR		CALIFORNIA Department of General Services Use Only
<small>CONTRACTOR'S NAME (If other than an individual, state whether a corporation, partnership, etc.)</small> County of San Mateo		
<small>BY (Authorized Signature)</small> 	<small>DATE SIGNED (Do not type)</small>	
<small>PRINTED NAME AND TITLE OF PERSON SIGNING</small> Rose Jacobs Gibson, President, County of San Mateo Board of Supervisors		
<small>ADDRESS</small> 400 County Center, Redwood City, CA 94063-1662 Billing: 500 Quarry Rd., San Carlos, CA 94070		
STATE OF CALIFORNIA		
<small>AGENCY NAME</small> Department of Rehabilitation		<input type="checkbox"/> Exempt per:
<small>BY (Authorized Signature)</small> 	<small>DATE SIGNED (Do not type)</small>	
<small>PRINTED NAME AND TITLE OF PERSON SIGNING</small> Jean Johnson, Manager, Fiscal and Business Services		
<small>ADDRESS</small> 2000 Evergreen Street, Sacramento, CA 95815		

**EXHIBIT A
ISSP CONTRACT
COUNTY OF SAN MATEO
VOCATIONAL REHABILITATION SERVICES (VRS)
& DEPARTMENT OF REHABILITATION (DOR)**

**PLAN OF OPERATION
July, 2002 – September, 2003**

SCOPE OF WORK

I. Introduction

The California Department of Rehabilitation (DOR) was awarded funds from the Social Security Administration (SSA) to develop and implement a five-year research and demonstration project. Its purpose is to develop an integrated service delivery system which increases employment and retention of employment of individuals with severe psychiatric disabilities who receive Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI). San Mateo County Human Services Agency was selected to implement the project with Vocational Rehabilitation Services (VRS), its county run employment services program, designated to be the demonstration site. This demonstration project is anticipated to end in September, 2003.

II. Services to Be Provided

This contract will provide State funding for 2 County Service Coordinators, 2 County Benefits Coordinators, **and 1 Benefits Consultant** who will be County employees. This staff will provide the following services:

A. Service Coordination. The Service Coordinator will provide and/or arrange for the support services necessary for the individual to obtain and maintain employment. For each individual choosing to participate in this project, an Individual Self Sufficiency Plan (ISSP) will be developed. This is a written agreement between the individual and

VRS that will outline what benefits the participant is receiving, and those elements identified as employment barriers. It will then indicate the services and supports that will be provided to address those barriers. Assistance will be given to implement the ISSP and ongoing support services will be provided. This position also provides for data collection on a monthly and/or quarterly basis to collect information for the research design.

B. Benefits Coordinator. The Benefits Coordinator will provide complete and accurate information on the impact working will have on an individual's range of benefits. (SSI, SSDI, subsidized housing) The Benefits Coordinator will also facilitate the development of the individuals ISSP, and assist in the management of benefits and Social Security work incentives, advocate with SSA and coordinate services with treatment professionals, case management, DOR, or other service providers. This position also provides for data collection on a monthly and/or quarterly basis to collect information for the research design.

C. Benefits Consultant. The Benefits Consultant will provide consultation, training, and technical assistance to California's 23 remaining mental health cooperative programs on the Benefits Planner/Service Coordinator model that has been successfully demonstrated in this grant. The Benefits Consultant will deliver a training curriculum that has been developed and piloted. The Benefits Consultant will then provide ongoing consultation, upon request, to mental health cooperative programs that have designated staff in the role of Benefits Coordinator. Additional requesting agencies may be accommodated, should time and availability allow. Additionally the Benefits Consultant will develop a Consumer Benefits Management Workbook that will provide individuals receiving SSI, SSDI, or both, a tool for effectively managing benefits while working.

III. Methodology

A. Referrals Program participants will be individuals with psychiatric disabilities who are recipients of SSI and/or SSDI. Referrals will come to the project through VRS. Before being

enrolled in the ISSP Project, each potential referral will be provided information about the purpose of this project and the information that will be required of them as participants. They will be given the option of declining to participate. Each participant will sign an informed consent.

- B. Service Delivery It is possible that the services provided by the Benefits Coordinator and Service Coordinator may be available to an individual who is not currently a client of the DOR. However, if that individual is in need of services provided through the mental health cooperative program, those services may not be provided until that individual has been determined eligible for DOR services and has a level of Significance of Disability (LSOD) score that is being served under the Order of Selection.

- C. Advisory Body The San Mateo County B.E.S.T. Network (Building Employment Services Team), a collaborative of local rehabilitation agencies, will serve as the advisory board to the Contractor. In addition to VRS, county mental health and DOR, members include mental health provider agencies, community colleges, county training programs, mental health consumers and family members.

- D. One Stop Involvement VRS is co-located and is a partner of Peninsula Works San Carlos, one of three sites comprising the San Mateo County One Stop Career Center network. Resources and services include: vocational rehabilitation services, job seeking skills classes, job placement, housing and family programs, aid payment resources, State Employment Development Department (EDD) job services, community college and adult education resources, and other core, intensive and training resources mandated by the Workforce Investment Act. All of these resources will be available to individuals participating in this demonstration project.

- E. State Level Support The following positions will provide oversight, support and evaluation to the demonstration project:

1. State Department of Rehabilitation Contract Administrator will work closely with the Contractor and be responsible for the implementation of the work plan. The Contract Manager will develop or coordinate the development of required reports to the State Coordination Committee and SSA.

2. A State Program Evaluator under contract with DOR will work with the sites on data collection and reporting processes. The Program Evaluator will analyze and develop quantitative reports.

IV. Objectives

At least one hundred (100) individuals per year will be served in this demonstration project. As a result of this project it is expected that there will be:

1. Increased employment of program participants
2. Increased employment retention
3. Increased earnings among the project participants.
4. Decreased payments from SSA
5. **An increase in trained staff designated as Benefits Coordinators in California's Mental Health Cooperative programs.**
6. **A Consumer Benefits Management Workbook completed and available for dissemination.**

V. Data Collection and Reporting Requirements

Under this agreement, the Contractor agrees to cooperate with the State DOR Contract Administrator of the project to develop appropriate eligibility requirements, data collection and reporting mechanisms, and means by which to measure the above **six** objectives.

The Contractor will develop procedures to identify and verify social security numbers for all project participants. All data provided to the State DOR Contract Administrator and/or Project Evaluator will include these validated participant social security numbers.

The Contractor further agrees to develop procedures to record and verify the beginning and ending dates of project participation and will record these two events on all data files submitted to the State DOR Contract Administrator and/or Project Evaluator.

The Contractor will collect all data elements as required by SSA. This data will be collected for all program participants. Employment status data will be updated monthly. Project updates will be collected quarterly. Data will be submitted to Virginia Commonwealth University (VCU) as required until the data system is installed at the project site. Once installed, the data will be updated electronically on a monthly basis. Demographic information on new participant enrollees will be sent to DOR for tracking and research match design purposes.

For purposes of tracking cost and benefit outcomes of the project, the Contractor will collect and track any necessary participant information as identified by the State DOR Contract Administrator relating to any waivers that may be approved by SSA and offered to project participants.

The Contractor will provide a monthly report of mental health cooperative programs receiving benefits planning training, summary of trainee evaluations, number of consultation contacts, and draft products completed toward the Consumer Benefits Management Workbook.

VI. Contract Administrator/Contractor Program Coordinator

Department of Rehabilitation
Warren Hayes, Contract
Administrator
2000 Evergreen Street

Sacramento, CA 95815
(916) 263-8986

County of San Mateo
Human Service Agency
Vocational Rehabilitation
Services
Robert Manchia, Manager
550 Quarry Road
San Carlos, CA 94070
(650) 802-6491

STATE OF CALIFORNIA
 SERVICE INVOICE
 DR 801A (REV. 02/98)

Original DEPARTMENT OF REHABILITATION
 Amendment Revision

County of San Mateo Human Services Agency 550 Quarry Road San Carlos, CA 94070		Contract Number:	Federal ID Number: ID 94-6000-532	Page of Pages 1 of 1	
		Budget Period 7/1/02-6/30/03	Effective Date: 1/1/03-6/30/03	Effective Date:	
Line No.	Position Title/% of Time Expense & Description	Amount Budgeted	Budget Change	Budget Change	TOTAL BUDGET
1	ISSP SERVICE COORDINATOR - 2 FTE	123,241.00			123,241.00
2	ISSP BENEFITS COORDINATOR - 2 FTE	165,500.00			165,500.00
3	ISSP BENEFITS CONSULTANT - 1 FTE		40,170.00		40,170.00
4	TRAVEL		5,941.00		5,941.00
	TOTALS	288,741.00	46,111.00		334,852.00

Indirect costs are allowable costs incurred by an organization which support the activities of contract, but are not directly assigned to the specific program or contract and are allocated to the program or contract using a method in compliance with Office of Management and Budget (OMB) circulars. The allocation method must be fully explained in the contract budget narrative and must be supported by actual costs incurred and paid by the organization. The allocation of indirect costs cannot be based on an arbitrary fixed rate.

STATE OF CALIFORNIA
 SERVICE INVOICE
 DR 801A (REV. 02/98)

DEPARTMENT OF REHABILITATION
Amendment Revision

Original

County of San Mateo Human Services Agency 550 Quarry Road San Carlos, CA 94070		Contract Number:	Federal ID Number: ID 94-6000-532	Page of Pages 1 of 1	
		Budget Period 7/1/03-6/30/04	Effective Date: 7/1/03-9/30/03	Effective Date:	
Line No.	Position Title/% of Time Expense & Description	Amount Budgeted	Budget Change	Budget Change	TOTAL BUDGET
1	ISSP SERVICE COORDINATOR - 2 FTE	31,707.00			31,707.00
2	ISSP BENEFITS COORDINATOR - 2 FTE	42,579.00			42,579.00
3	ISSP BENEFITS CONSULTANT - 1 FTE		20,085.00		20,085.00
4	TRAVEL		2,970.00		2,970.00
	TOTALS	74,286.00	23,055.00		97,341.00

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BUDGET NARRATIVE

1. ISSP Service Coordinator – 2 FTE at 40 hours per week, including salary and benefits (see duty statement and program narrative).
2. ISSP Benefits Coordinator – 2 FTE at 40 hours per week, including salary and benefits (see duty statement and program narrative).
3. **ISSP Benefits Consultant – 1 FTE at 40 hours per week, including salary and benefits (see duty statement and program narrative).**
4. **Travel – Includes airfare, parking, lodging, per diem, and mileage at prevailing state rates to travel to California's mental health cooperative programs to provide Benefits Planning training and consultation.**

DUTY STATEMENTS

Job Description: ISSP Service Coordinator

Title: Individual Self Sufficiency Project (ISSP) Service Coordinator

Basic Function: Participates in the development and Implementation of the Individual Self-Sufficiency Plan; provides and/or arranges to be provided support services necessary for individuals with severe psychiatric disabilities to maintain employment.

Reports to: Local Site Director

Qualities sought: Ability to communicate well orally and in writing; ability to work well with others in a team environment.

Examples of Duties:

1. Conducts service needs assessment with individual participants.
2. Facilitates the development of the Individual Self Sufficiency Plan.
3. Coordinates individual service and support teams.
4. Reviews and revises ISSP with the individual as needed.
5. Assists individual with reporting wage information.
6. Refers to or provides advocacy services as needed.
7. Develops local resource networks.
8. Coordinates inter and intra agency services as needed.
9. Completes and transmits monthly projection data.
10. Maintains individual participant time logs for units of service.
11. Develops and facilitates a local Interagency Task Force.
12. Reviews progress on local work plans with the local coordinating council.

Title: Individual Self Sufficiency Project (ISSP) Benefits Coordinator.

Basic Function: Provides benefits/financial planning assistance to individuals served in DR/MH cooperatives; facilitates the development of the Individual Self Sufficiency Plan.

Reports to: Local Site Director

Qualities sought: Ability to communicate well orally and in writing; ability to work well with others in a team environment.

Examples of Duties:

1. Evaluates current levels of benefits as well as basic, monthly living costs.
2. Develops the benefits section of the Individual Self Sufficiency Plan.
3. Conducts group and individual orientations regarding benefit programs.

4. Provides ongoing training and technical assistance on benefits to individuals.
5. Assists individuals in accessing public benefits programs as needed.
6. Makes available information and helps implement SSA work incentive programs which facilitate return to work and maintenance of employment.
7. Reviews and assesses changing individual employment needs as they are related to impact on benefits.
8. Establishes an earnings and reporting system for incentive income with the local SSA field office.
9. Provides ongoing cross-training to all local stakeholders on benefits and their effects on employment.
10. Participate in ongoing training and technical assistance with the Benefits Consultant.
11. Maintain communication with the local SSA field office and attend project meetings.

Title: Individual Self Sufficiency Project (ISSP)
Benefits Consultant.

Basic Function: Provides training, technical assistance and consultation to Benefits Coordinators throughout California. Develops a Consumer Benefits Management Workbook.

Reports to: Local Site Director

Qualities sought: Ability to communicate well orally and in writing; extensive experience and success as a Benefits Coordinator.

Examples of Duties:

1. Develops a Benefits Coordinator training curriculum.
2. Trains benefits coordinators throughout California.
3. Maintains contact with SSA field and regional offices.
4. Provides ongoing benefits consultation to programs.
5. Provides ISSP Grant presentations upon request.

- 6. Provides ongoing mentoring to ISSP Benefits/Service Coordinators in local site.**
- 7. Develops and field tests a Consumer Benefits Management Workbook.**
- 8. Participates in ISSP Coordinating Committee meetings and activities.**