

**EVALUATION RESULTS OF THE CLIMB TO
EMPLOYMENT GRANT – YEAR 3**

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About the *Division of Vocational Rehabilitation*

The *Division of Vocational Rehabilitation* (DVR), a division of the Delaware Department of Labor, has essential partnerships with individuals with disabilities, advocates, and employers. DVR is a public program offered through the state of Delaware and helps people with physical and mental disabilities to obtain or retain employment. The mission of DVR is “to provide opportunities and resources to eligible individuals with disabilities, leading to success in employment and independent living.” The services offered to clients from DVR include vocational assessment, employment planning, counseling and guidance, job placement, and job follow-up. Project CLIMB (Consortium Leadership and Independence through Managing Benefits) is offered through DVR to individuals who are working, or interested in working, and are receiving any type of public support benefits. The CLIMB program provides benefits counseling by trained Benefits Specialists. The counseling sessions include information on the impact of earnings on benefits, management of benefits when becoming employed, and reducing barriers to employment encountered by public support programs. DVR's commitment is to help people with disabilities increase their independence through employment.

About the *Delaware Education Research and Development Center*

The University of Delaware *Education Research and Development Center* provides the state with a developmental and inquiry capacity in support of efforts to reform educational policy and practice. The *R & D Center* currently partners with the Delaware Department of Education, U.S. Department of Education, National Science Foundation, as well as various private and charitable organizations. The mission of the *R & D Center* is “to be a major voice that informs education policy and practice.” The *R & D Center* addresses its mission through six areas of work: development work; data-based decision-making; studies, analyses, and publications; systemic reform evaluation; ad hoc evaluation support; and university support and service. The *R & D Center* acts as a link between the areas of educational research and practice.

About the *Center for Disabilities Studies*

The *Center for Disabilities Studies* at the University of Delaware is one of the 62 University Affiliated Programs Centers for Excellence in Developmental Disability Research Education and Service (UCD) in the United States. The *Center* was established in 1992 and works in conjunction with individuals with disabilities to better their lives. The *Center* staff and affiliated faculty teach both pre-service and in-service courses for teachers, social service workers, and other service providers working with individuals with disabilities and their families. The *Center* operates state-of-the-art programs and assists both public and private organizations in adopting the procedure developed to operate those programs. *Center* staff and affiliated faculty also serve on state and national policy boards and commissions that address housing, transportation, education, advocacy, child care, health care, and other service areas. *Center* staff also conduct program evaluations with programs serving individuals with disabilities and assist in policy development at both the local and state levels. The *Center for Disabilities Studies* is located in 166 Graham Hall at the University of Delaware in Newark.

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EXECUTIVE SUMMARY

The purpose of the evaluation is to provide relevant information regarding the project implementation and its impact on youth and adults with disabilities for both project improvement and accountability purposes. In the CLIMB to Employment application submitted through the Delaware Division of Vocational Rehabilitation in 2002, the goals of the project included the following:

- ❑ To improve the ability of individuals with disabilities to make informed choices during the employment process; and
- ❑ To recommend changes to rules and regulations which have a negative impact on employment outcomes.

Evaluation Question 1

To what degree is the CLIMB to Employment Program providing clients with the knowledge to make wise financial decisions regarding employment and household budgeting?

Responses to items on the Client Satisfaction Survey and interview data were used to address this evaluation question. Unless otherwise noted, all results are from Year 3.

Client Satisfaction Survey Results

A total of 448 completed surveys were returned, 169 in Year 1, 135 in Year 2 and 144 in Year 3.

- ❑ In Year 1, approximately half of the surveys were returned by clients from Pencader, while in Year 2 about half were returned from Wilmington and in Year 3 about 40% were returned from Wilmington.
- ❑ Eighty-three percent of clients surveyed were very satisfied with their benefits counseling.
- ❑ About 92% of clients surveyed were very likely to recommend the service to others.
- ❑ Approximately 36% of the clients surveyed received budget training and nearly 82% of those who received budget training found it very helpful.
- ❑ Approximately 82% of respondents indicated that counseling was very helpful to their understanding how employment would affect their benefits.
- ❑ Close to 70% of clients are a little or much less concerned about losing their benefits after meeting with a benefits specialist. However, close to 11% are much more concerned.

Client Interview Results

Thirty-one clients were interviewed.

- ❑ The results of the client interviews support the positive survey findings.
- ❑ *All* of the clients interviewed mentioned the *Project CLIMB* benefits counselors as a positive aspect of the program.

- ❑ The skills of the benefits counselors were also highly valued by the clients interviewed for this evaluation.
- ❑ The vast majority (87%) of clients interviewed reported that they understood the services and supports that they received from *Project CLIMB*. This is large increase from 61% reported in the 2003 evaluation.

Evaluation Question 2

What is CLIMB clients' knowledge about WorkWORLD as a resource?

Client Satisfaction Survey Results

- ❑ Approximately 19% of clients surveyed indicated that WorkWorld was used during their counseling session.
- ❑ Of the 19% who used WorkWorld, 85% indicated it helped them understand the impact of work on their net income a great deal or a fair amount.

Client Interview Results

- ❑ None of the clients interviewed recalled their benefits specialists using WorkWORLD during the counseling session.

Evaluation Question 3

To what degree are clients seeking, obtaining, and retaining employment?

Client Satisfaction Survey Results

- ❑ Only one item on the Client Satisfaction Survey addressed client's employment status. Nearly 29% of clients who responded to the survey were employed at the time of their survey completion.

Client Interview Results

- ❑ Only about 13% of the 31 clients interviewed indicated that they had never been employed since the acquisition of their disability.
- ❑ Approximately 87% of the clients reported that prior to receiving Project CLIMB services, they had a variety of employment opportunities.
- ❑ Slightly less than one-third of clients indicated that they had worked more than 10 hours a week since receiving their Project CLIMB services.
- ❑ Around 85% of the clients stated that they wished to be able to work at least 20 hours per week and to advance in the types of jobs they could hold.
- ❑ About 45% of clients agreed that they were better prepared to seek work and to balance work with their health care, housing and other benefits due to their counseling sessions through Project CLIMB.

Evaluation Question 4

What are CLIMB clients' perceptions of the incentives to and barriers against their entering the world of work?

Client Interview data was used to address evaluation question four.

- ❑ Clients identified 28 different barriers to employment. Of the 28 barriers identified in the interview analysis, eight are similar to those identified in the Year 2 database analysis including: criminal history, disability discrimination, intermittent health problems, lack of math skills, lack of specific training for current job market, low paying jobs, losing disability benefits and transportation
- ❑ Clients identified many incentives to employment, the most common of which were: more assistive technology in the workplace, decreased disability stigma/discrimination in the workplace, earning additional degrees or certificates, reliable transportation, cure for specific disabilities, and availability of skilled job positions rather than service jobs.

Evaluation Question 5

What is the current status of state and federal policies on the ability of individuals with disabilities to become employed, stay employed, and to live independently?

Evaluation Question 6

What is the impact of the creation of a Benefits Consortium and a Client Advisory Board on state and federal policies affecting the ability of individuals with disabilities to become employed, stay employed, and to live independently?

Evaluation questions five and six are combined to create a more cohesive understanding of the interview results. Benefits specialist and consortium member interviews were conducted to answer these two questions. Three of the four benefits specialists and seven consortium members were interviewed.

- ❑ Benefits specialists identified several system-wide changes that could facilitate individuals with disabilities entering or re-entering the work force, for example, benefits for lower paying and part-time employment and better transportation.
- ❑ Benefits specialists felt they had little or no control over the state and federal benefits structures.
- ❑ Policy changes recommended by consortium members included need for universal health care and the need for more transition time between earning a salary above the eligibility level for federal benefits and those benefits being reduced or cut.
- ❑ Both benefits specialists and consortium members indicated that they felt systemic change was necessary to improve employment opportunities for individuals with disabilities, but that they did not see this happening soon.

The full report provides a detailed account of all evaluation results for the CLIMB to Employment grant. Researchers at the University of Delaware Education Research and Development Center (R&D Center) are available to answer questions regarding analyses presented in this report or to assist in their interpretation. R&D Center staff may be contacted via electronic mail at ud-rdc@udel.edu or by phone at (302) 831-4433.

INTRODUCTION

In the fall of 2002, the University of Delaware Education Research and Development Center in collaboration with the Center for Disabilities Studies accepted a contract to conduct a statewide evaluation of the recently awarded CLIMB to Employment grant. This project and its attendant evaluation are funded through the U.S. Department of Education's Rehabilitation Services Administration. The CLIMB to Employment project targets youth and adults with disabilities throughout Delaware by providing benefits counseling and household budgeting so that clients may gain a better understanding of how employment impacts state and federal benefits.

The purpose of the evaluation is to provide relevant information regarding the project implementation and its impact on youth and adults with disabilities for both project improvement and accountability purposes. In the CLIMB to Employment application submitted through the Delaware Division of Vocational Rehabilitation in 2002, the goals of the project included the following:

- ❑ To improve the ability of individuals with disabilities to make informed choices during the employment process; and
- ❑ To recommend changes to rules and regulations which have a negative impact on employment outcomes.

In addition, an overarching goal of the project is to improve the ability of individuals with disabilities to decrease their reliance on state or federal benefits and increase their reliance on employment income. Therefore, the primary focus of this evaluation is to provide information regarding how well the CLIMB to Employment project has met these three goals. The evaluation of the CLIMB to Employment Grant has proceeded along two lines of activity:

- ❑ formative evaluation to provide relevant information to the CLIMB Consortium and,
- ❑ impact studies to assess the impact of the initiative on clients as it relates to employment.

METHODOLOGY

Theory-Based Evaluation

Although often unstated, all projects are based on theories of how and why they should "work" (Weiss, 1995). *Theory-based evaluation* provides a useful framework for formalizing the logic of the theories underlying a project and in guiding the determination of measurement points during the evaluation (Aronson, Mutchler, & Pan, 1998). Examining the theories on which a project is based aids in determining what evaluation data should be collected and when, during the project lifecycle, it should be collected. However, evaluative data cannot be interpreted in isolation without also examining how the project was implemented. For example, if an evaluation reveals that client outcomes did not improve, it would be incorrect to assume that the theories underlying the project should be rejected. Rather, the project's implementation should be examined to determine if the implementation was congruent with the hypothesized theories underlying the project. On the other hand, if client

outcomes did improve, it is equally as important to postpone acceptance of the underlying theories until sufficient implementation has been verified.

The overarching goal of the CLIMB to Employment Grant is to increase dependence on employment earnings and decrease dependence on state and federal benefits. Theory-based evaluation methods are used to document why project staff believes this intervention will result in a decrease in dependence on state and federal benefits, and to specify what data must be collected during the evaluation lifecycle to determine if intervention results support these theories. The critical theory behind this project is that through benefits counseling and household budget training, as well as through the elimination of system disincentives, clients' dependence on state and federal benefits will decline. With this theory in mind, data elements were identified that would aid in determining if the theories were acceptable. Figure 1 shows an abbreviated theory-based outcome grid for the CLIMB to Employment project.

Early Results	Intermediate Results	Long-Term Results
<ul style="list-style-type: none"> ➤ Benefits counseling provided ➤ Household budget training provided ➤ Identification of federal or state policies that hinder clients from achieving economic stability 	<ul style="list-style-type: none"> ➤ Improved understanding of the impact of employment on state and federal benefits policies ➤ Establishment of programs that address disincentives to employment 	<ul style="list-style-type: none"> ➤ Increased number of clients achieving economic stability (with as little public support as possible) ➤ Fewer state or federal policies that hinder clients from achieving economic stability

Figure 1: Theory-based evaluation outcome grid

Evaluation Design

The evaluation study addressed the following evaluation questions for this reporting period¹:

Goal 1: To improve the ability of individuals with disabilities to make informed choices during the employment process

- a. To what degree is the CLIMB to Employment Program providing clients with the knowledge to make wise financial decisions regarding employment and household budgeting?
- b. What is CLIMB clients' knowledge about WorkWORLD as a resource?
- c. To what degree are clients seeking, obtaining, and retaining employment?

Goal 2: To recommend changes to rules and regulations which have a negative impact on employment outcomes

¹ For the complete scope of work for the most recent contract, including those evaluation questions not addressed in this report, see Appendix B.

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- a. What are CLIMB clients' perceptions of the incentives to and barriers against their entering the world of work?

This evaluation utilized two different methodologies: Client Satisfaction Surveys and interviews. Data collection for the client satisfaction surveys began in December of 2002. This survey was created by a sub-committee of the CLIMB Consortium and distributed to each CLIMB participant by one of the four Benefits Counselors. A revised version of the Client Satisfaction Survey designed to better address the evaluation questions was distributed starting in September of 2004. Along with a copy of the survey, each CLIMB participant was provided with a self-addressed stamped envelope to return the completed survey directly to the evaluation team at the University of Delaware. During the summer of 2005, clients, benefits counselors and consortium members involved with the Division of Vocational Rehabilitation Project CLIMB services were interviewed to determine the impact that the program was having on clients and their perceptions of the barriers to employment.

FINDINGS

The findings from this year's evaluation are described in two main sections. The first section details general descriptive information about the groups of clients who responded to the Client Satisfaction Survey and interviews. The second section discusses data associated with each of the evaluation questions posed for this reporting period.

Description of Client Satisfaction Sample

Between October 2004 and 2005, 144 Client Satisfaction Surveys were received and analyzed. Approximately 40% of the surveys were received from the Wilmington branch (see Table 1).

Table 1. Client satisfaction survey respondents by location.

Service Provider	Client Satisfaction Survey Respondents
Wilmington	40.3%
Pencader	25.7%
Dover	25.0%
Georgetown	9.0%

The majority of respondents were between the ages of 35 and 54 years old (see Table 2). Regarding race, the sample was composed primarily of white (56.0%) and African American (38.3%) clients (see Table 3).

Table 2. Client satisfaction survey respondents by age.

Age	Client Satisfaction Survey Respondents	Population of Clients*	Delaware Population (2000 Census)
< 20	3.6	1.8%	28%
20-24	10.2%	8.6%	7%
25-34	11.6%	14.9%	14%
35-44	31.1%	27.0%	17%
45-54	27.6%	30.7%	13%
55-59	11.6%	9.5%	5%
60-64	4.3%	5.8%	4%
65-84	0.0%	1.7%	12%

* Taken from the May 2005 database extract.

Table 3. Client satisfaction survey respondents by race.

Race	Client Satisfaction Survey Respondents	Delaware Population (2000 Census)
White	56.0%	73%
Black or African American	38.3%	19%
American Indian or Alaska Native	0.7%	< 1%
Asian/Pacific Islander	1.4%	2%
Hispanic or Latino	0.7%	5%

Regarding gender, women represented a slight majority; composing 57.3% of the sample (see Table 4). Of the clients surveyed, 28.9% were employed, 57.8% were not employed, but looking for work and 13.3% were not employed and not looking for work (see Table 5).

Table 4. Client satisfaction survey respondents by gender.

Gender	Client Satisfaction Survey Respondents	Population of Clients*	Delaware Population (2000 Census)
Male	42.7%	48.9%	48.6%
Female	57.3%	51.1%	51.4%

* Taken from the May 2005 database extract.

Table 5. Client satisfaction survey respondents by employment classification.

Employment Status	Client Satisfaction Survey Respondents	Year 1 Database Data	Year 2 Database Data
Employed	28.9%	58%	43%
Unemployed, looking for work	57.8%	42%*	57%*
Unemployed, not looking for work	13.3%		

* For Year 1 & 2 unemployed status was not disaggregated into “looking for work” and “not looking for work”.

Description of Client Interview Sample

The clients interviewed were from throughout the state and represented a variety of disabilities. Slightly more women than men were interviewed. The average age of the clients was late 30s to mid-40s. The specific disabilities of the clients included: physical, cognitive, and mental health disabilities. For specifics on the backgrounds of the clients interviewed see Table 6 below.

Table 6. Gender, age, and primary disability of interviewed clients.

Demographics by Gender					
	Gender	Average Age	Physical Disability	Cognitive Disability	Mental Health Disability
Female	54.8%	43	44%	19%	38%
Male	45.2%	38	29%	36%	29%
Female & Male	100.0%	41	37%	27%	33%

Disability Type

Most of the clients interviewed had a single disability (71.0%). About 19% of the clients had two disabilities and about 10% of the clients had three disabilities.

Acquisition of Disability

Almost three-fifths of the clients interviewed acquired their disabilities after they were 16 years of age. These were disabilities such as traumatic brain injuries, early adult on-set mental health disorders and disabilities related to chronic health concerns. Most of the disabilities acquired prior to age 16 were cognitive disabilities.

Place of Residency

One-third of the clients interviewed lived in Kent and Sussex Counties while almost 23% lived in Wilmington and almost 39% lived in other parts of New Castle County. This distribution of clients interviewed slightly over-represents Wilmington but otherwise represents the distribution of the general population of Delaware.

Household Income

The household income of the clients interviewed ranged widely. One client reported income as low as \$1,440 per year while another reported an annual household income of \$150,000. The average annual household income of the 31 clients interviewed was \$25,538.

Homelessness

Of the 31 clients interviewed, more than half had experienced homelessness at some point during their adult lives. About 54% had not had a home or apartment of their own and had to stay with friends, family, or in shelters for more than a month during their adult years.

Household Mobility

The clients, as a group, experienced a fairly high level of household mobility. The average number of household moves for the 31 clients was 3.6 with a range of no moves to a high of 12 moves since they acquired their disability.

Description of Benefits Specialist and Consortium Member Interview Sample

Three of the four *Project CLIMB* benefits counselors were interviewed for this project evaluation as were seven of the *Project CLIMB* consortium members. As in the past, the benefits specialists were very willing informants about the project and provided extensive detailed information about the activities of the project as well as their perceptions about how their clients used the information provided. There was an increase of Consortium members interviewed from the three interviewed in 2003. Unlike the 2003 interviews, this set of Consortium

members were very willing to talk about the project and were well informed about the activities of the project. This may be because a subgroup of very involved consortium members was used as the pool from which the interviewees were selected.

Evaluation Question Results

In this section, the results from both the Client Satisfaction Survey and the interviews are presented and organized around the six evaluation questions posed for this reporting period.

Evaluation Question 1

To what degree is the CLIMB to Employment Program providing clients with the knowledge to make wise financial decisions regarding employment and household budgeting?

Client Satisfaction Survey Results

Responses to items on the client satisfaction survey and interviews are used to address this evaluation question. A total of 448 completed surveys were returned, 169 in Year 1, 135 in Year 2 and 144 in Year 3. While in Year 1, approximately half (45%) of the surveys were returned by clients from the Pencader location and about 10% from Georgetown, in Year 2 half (50%) of the surveys were returned from the Wilmington location and the percentage from Pencader was reduced to about 20%. Year 3, followed a similar return pattern as Year 2, with about 40% of the surveys returned from Wilmington and about 26% from Pencader.

In Year 3, approximately 83% of respondents were very satisfied with their benefits counseling and about 92% were very likely to recommend benefits counseling to others. This indicates a slight decrease in satisfaction and likelihood of recommendation. Survey responses for both Year 1 and Year 2 indicated that most clients, nearly 90%, were very satisfied with the benefits counseling they received and an even greater percentage (97%) would recommend the service to others.

In Year 3, a higher percent of clients than in Years 1 and 2 indicated that the information provided by their benefits specialist was useful. In Years 1 and 2 approximately three-fourths of the clients returning completed surveys felt the information provided during the benefits counseling session was useful in making a decision to return to work as compared to about 83% in Year 3. Additionally, in Years 1 and 2 nearly 100% indicated that the information was provided to them in a way they could understand. In Year 3, about 97% indicated that materials given to clients by their benefits specialist were very understandable or somewhat understandable.

Several items that were added when the Client Satisfaction Survey was revised also addressed the first evaluation question. Four items addressed budgeting and two items focused on contacting benefits specialists. Regarding budgeting, almost 49% of clients surveyed indicated that their benefits specialist offered them budget

training and approximately 36% of the clients surveyed received budget training. About 82% of those who received budget training found it very helpful.

Regarding contacting their benefits specialist, about 99% of clients surveyed indicated that they knew how to contact their benefits specialist if they had questions. Nearly three-fourths (74%) indicated that they would be very likely to contact their benefits specialist in the future. Finally, approximately, 82% of clients surveyed felt that their benefits counseling session very much helped them understand how employment would affect their benefits. There were, however, some mixed results on how this understanding affected their level of concern about losing their benefits. While nearly 70% were a little or much less concerned, almost 11% were much more concerned. For a complete account of the quantitative survey results, see Appendix A.

Client Interview Results

Perceptions of Project CLIMB Services

The average number of *Project CLIMB* counseling sessions received by the clients interviewed for this evaluation was 1.2 with a range of one to four sessions. The clients were overwhelmingly positive about the counseling sessions, the services they received and the employment counselors.

Approximately 77% of the 31 clients interviewed remembered receiving counseling directly about benefits and employment. In addition to benefits counseling, about 61% remember receiving counseling about budgeting, job searches, and job interviewing.

Perceptions of Benefits Counselors

All of the clients interviewed mentioned the *Project CLIMB* benefits counselors as a positive aspect of the program. They specifically said that the counselors were personable, took the time to listen to them and explained the impact of working related to their health care, social security, and other benefits. Seven of the clients specifically stated that they felt they could re-contact their benefits counselors if they needed additional help. It should be noted that these sentiments were mirrored in the open-ended responses to the Client Satisfaction Survey. Other positive comments during the interviews included:

- “s/he accepts me for who I am,”
- “s/he was knowledgeable about the things that mattered to me,” and
- “s/he was able to individualize her talk; she did just read from a paper.”

Perceptions of Benefits Counselor Skills

The skills of the benefits counselors were also highly valued by the clients interviewed for this evaluation. They stated that the counselors were “knowledgeable,” “thoughtful,” and “capable.” One client specifically said that the counselor with whom she worked provided “good information” and “challenged her to work to high standards.”

Perceptions of Project CLIMB

The vast majority of clients interviewed reported that they understood the services and supports that they received from *Project CLIMB*. Over 60% reported understanding the relationship of Project CLIMB to the various state and federal benefits programs. In addition, over 58% reported having a better understanding of how becoming employed would impact the benefits they received. A small minority of the clients (16%) did not specifically remember receiving services from *Project CLIMB* or that the project was a separate service of the Division of Vocational Rehabilitation.

Understanding Regulations and Employment Requirements

Of the 31 clients interviewed 27 (87%) indicated that they better understood the impact that employment would have on their benefits and eligibility for such programs as Medicaid and SSDI. The clients were able to state specifically how employment would affect their benefits with such statements as “she [the benefits counselor] explained the transition period for SDDI” and “I can now look at my situation realistically and understand how to balance work and my benefits.”

This reporting by clients that they better understand the impact of employment on their disabilities benefits is different than what clients reported for the *Project CLIMB* evaluation in 2003. At that time, only 61% of the clients interviewed indicated that they better understood how employment would have an impact on their eligibility for benefits.

This does not, however, mean that all clients were more disposed to seek employment. Some clients indicated that the impact of employment on their eligibility for services was too risky. One client stated that she “did not want to work a full week because it would make me ineligible for Medicaid.” This was a theme for a number of clients who felt that the impact of the benefits counseling was to allow them to better understand how much work they could do on a weekly basis. One client stated more bluntly, “I learned it was too much of a hassle to work.”

Improving the Benefits Counseling

The clients who were interviewed also talked specifically about how the benefits counseling could be improved. The following specific suggestions were made:

- continue to simplify the language so that the bureaucratic terminology of benefits programs is easier for the average person to understand
- have a yearly review to see if anything has changed about individual’s eligibility status
- build in a follow-up session; some clients did not generate questions until after the counseling session

When talking about ways to improve the *Project CLIMB* benefits counseling, many clients also talked about overall Division of Vocational Rehabilitation (DVR) services. A few specific suggestions were

made related to DVR services. The most frequently mentioned suggestions were for counselors to have larger offices (for wheelchair access) and to do better matching of clients skills with job placements.

Evaluation Question 2

What is CLIMB clients' knowledge about WorkWORLD as a resource?

Client Survey Results

Client satisfaction survey data were intended to address clients' knowledge about the computer program WorkWORLD as a resource. The initial client survey did not address this topic, so a longer, more comprehensive one was developed. There are two questions on the survey that was sent out during this reporting period that ask about WorkWORLD (The client satisfaction survey and quantitative results can be found in Appendix A.). Of the 109 respondents to the question, "Was the computer software program WorkWORLD used during your counseling session(s)", 19.3% indicated the program was used. Of the respondents who used WorkWORLD, 48.1% indicated that Work WORLD helped them understand the impact of working on their net income a great deal and 37.0% indicated it helped a fair amount.

Benefits Specialist and Consortium Member Interview Results

All clients interviewed were asked about the use of WorkWORLD, a software program that assists persons with disabilities to determine what level amount of income they can earn and the impact that income will have on their federal, state, and if available, local benefits such as Medicaid eligibility and Social Security payments. None of the clients interviewed remembered their benefits counselors having used WorkWORLD with them or receiving a report of information developed from the software. Although the software was described and probes were asked of the individuals, no interviewee had any memory of the product or the information that might be used from the software.

Evaluation Question 3

To what degree are clients seeking, obtaining, and retaining employment?

Client Satisfaction Survey Results

The only item on the Client Satisfaction Survey that directly provides information about client employment activity is employment status at the time of the survey, which is detailed in Table 7. Nearly 29% of clients who responded to the survey were employed at the time of the survey.

Table 7. Client satisfaction survey respondents by employment classification.

Employment Status	Client Satisfaction Survey Respondents
Employed	28.9%
Unemployed, looking for work	57.8%
Unemployed, not looking for work	13.3%

Client Interview Results

During the interviews, the 31 clients were asked about their previous employment experiences, their current employment and their plans and wishes for future employment. Answers to those questions follow.

Employment Prior to Receiving Project CLIMB Services

Only four (13%) clients interviewed indicated that they had never been employed since the acquisition of their disability. The remaining clients reported that prior to receiving Project CLIMB services, they had a variety of employment opportunities ranging from sheltered workshop experiences to competitive employment in such settings as hardware stores, offices, child care centers, retail stores and chicken processing factories. The average number of positions that the 27 clients reported holding since age 16 and prior to receiving Project CLIMB services was 2.9. The average number of hours worked by the clients was 29 hours per week at an average rate of pay of \$8.89 per hour for an average of \$258 per week (see Table 8). The average length of time in any one employment position prior to receiving Project CLIMB services was 1.3 years. Immediately prior to receiving Project CLIMB services, only about 19% of clients interviewed were working more than 10 hours per week.

Table 8. Wages before and after receiving Project CLIMB services.

	Average Hours Per Week	Average Pay Per Hour	Average Pay Per Week	Percentage of Clients Working more than 10 hrs/wk
Prior to Receiving Project Climb Services	29 hours	\$8.89/hour	\$258	19%
After Receiving Project CLIMB Services	32 hours	\$9.76/hour	\$312	52%

Employment Since Receiving Project CLIMB Services

Of the 31 clients interviewed, 16 (52%) of them indicated that they worked more than 10 hours a week since receiving their *Project CLIMB* services. These sixteen clients reported working an average of 32 hours per week and earning an average of \$9.76 per hour (see Table 8).

Desire for Future Employment

All of the clients indicated that they were interested in expanding their employment. Over 85% of the clients stated that they wished to be able to work at least 20 hours per week and to advance in the types of jobs they could hold. Approximately 45% agreed that they were better prepared to seek work and to balance work with their health care, housing and other benefits due to their counseling sessions through *Project CLIMB*.

Evaluation Question 4

What are CLIMB clients' perceptions of the incentives to and barriers against their entering the world of work?

Client Interview Results

Perceptions of Barriers to Employment

Each of the clients interviewed was asked about barriers to employment and the likelihood that they would be employed part-time or full-time in the near future. The clients provided considerable feedback regarding this issue. They clearly indicated that the services from *Project CLIMB* helped them to make decisions about employment but that there were many other factors related to whether or not they were partially or fully employed.

Barriers to Full Employment

The clients identified 28 different barriers to employment (see Table 9). Of the 28 barriers identified in the interview analysis, eight are similar to those identified in the Year 2 database analysis. Barriers identified in both the Year 2 and 3 analyses are presented in bold face font in Table 9.

Personal Barriers

Clients identified personal characteristics that limited their ability to search for and retain jobs. These personal characteristics included needing more training in a content area (e.g., technology, bookkeeping), additional education (e.g., college courses), or a general set of

employment skills (e.g. interviewing skills, job coaching). Several clients also stated that they have difficulty in finding a job for which they are both qualified and enjoy doing. Clients also identified interpersonal skills that they felt limited their ability to retain jobs. These included such skills as methods for reducing stress, skills for interacting with co-workers, and conflict management.

Table 9. Client identified barriers to employment.

Client Identified Barriers to Employment	
• Accommodations	• Lack of assistive technology
• Age discrimination	• Lack of math skills
• Anxiety responses to workplace	• Lack of motivation
• Appearance	• Lack of self-esteem
• Attention problems	• Lack of specific training for current job market
• Confidence	• Lack of stamina
• Criminal history	• Low paying jobs and losing disability benefits
• Difficulty working in groups	• Mobility barriers
• Disability discrimination	• Mood swings
• Discouragement from family members	• Substance abuse history
• Flexibility of job schedules	• Transportation
• Hearing problems	• Unsupportive work environments
• Intensity of work expected	• Unwillingness of clients to take any job
• Intermittent health problems	• Weight

Likelihood of Employment

Each of the clients were asked about the likelihood that they would be employed part-time (approximately 20 hours per week) or full time (approximately 40 hours per week) within the next year. Eighteen of the clients reported that it was probable or likely that they would be employed on a part-time basis within the next year. Only eleven clients felt that it was likely for them to be employed on a full-time basis within the next year. All of these individuals also reported they felt it was likely they would be working at least part-time within the next year.

Those who thought it was likely they would be working full-time or part-time within the next year identified need as the primary reason. They stated that they needed to begin to earn an

income and to support themselves. This was especially true of the individuals who felt they would be working full-time within the next year. Other reasons why clients felt they would be working within the next year included pending graduation from training or degree programs, changes in personal situations, and the desire to work and be connected to others through work.

For those clients who felt they would not be working, either part-time or full-time, within the next year, they identified the barriers stated above as the most likely reasons why. These included lack of transportation, lack of workplace accommodations, fears and anxiety, and concern about losing disability benefits.

Supports and Influences to Increase the Likelihood of Permanent Employment

The last questions clients were asked addressed what supports and influences they felt would make it more likely for them to become permanently employed. Clients identified a variety of responses such as the greater availability of assistive technology in the workplace, more training to prepare them for specific jobs in the field, a focus on more skilled and technical jobs rather than service jobs, the focus on careers rather than jobs and job coaches that work with the client to identify specific jobs (see Table 10).

Table 10. Client identified supports and influences for employment.

Client Identified Supports and Influences to Increase the Likelihood of Their Permanent Employment

- More assistive technology in the workplace
 - Decrease disability stigma/discrimination in the workplace
 - Earning additional degrees or certificates
 - Reliable transportation
 - Cure for specific disabilities
 - Availability of skilled job positions rather than service jobs
 - Assisting clients to focus on careers rather than job placement
 - Counselors to help search for, apply for, and interview for jobs
 - Positive support from family members
 - Positive support in the workplace
 - Training for supervisors and fellow employees about disabilities
-

Evaluation Question 5

What is the current status of state and federal policies on the ability of individuals with disabilities to become employed, stay employed, and to live independently?

Evaluation Question 6

What is the impact of the creation of a Benefits Consortium and a Client Advisory Board on state and federal policies affecting the ability of individuals with disabilities to become employed, stay employed, and to live independently?

Evaluation questions 5 and 6 are answered in the section below. They are combined to facilitate the cohesiveness of this discussion.

Benefits Specialists and Consortium Member Interview Results

The benefits specialists identified the federal benefits structure as one of the most important issues related to their clients entering or re-entering the job market. The benefits specialists interviewed felt that their clients had a better understanding of the impact of earning additional income on their federal and state benefits. However, this did not always result in clients being more likely to enter or re-enter the workforce. As one counselor said, clients' understanding of the impact of additional income on benefits made it, in some cases "not in their best interest to go to work." The benefits specialists identified a number of changes that they felt could increase the likelihood of employment for persons with disabilities:

- employers offering health care benefits for minimum and lower paying jobs as well as part-time jobs;
- better transportation to work places, especially for those with physical limitations;
- more flexible work hours and work tasks for persons with disabilities; and
- the availability of better paying jobs for persons with disabilities.

Unfortunately, the benefits specialists felt that they had little or no control over the state and federal benefits structures and that until those changed, the likelihood of increasing employment among persons with disabilities was very low.

Because the Consortium members are from employment agencies, local employers and supported employment agencies, they have significant knowledge about the barriers to employment for persons with disabilities. The number one barrier identified by the Consortium members for persons with disabilities being employed remained the loss of federal benefits due to income earned through employment. The Consortium members emphasized that the information and knowledge communicated by the benefits counselors was important, however, many clients use the information to decide not to work, since they will need to make significantly higher salaries to replace health insurance, housing, and other benefits. One Consortium member stated that the incomes of a person with a disability needed to be far above the minimum wage to recoup the

likelihood of lost benefits and thought that “work incentives like a fifty cent reduction in benefits for every dollar earned” would help increase employment.

The Consortium members identified additional barriers to employment for individuals with disabilities that revolve around the need for systemic changes. These included:

- the need for more transition time between earning a salary above the eligibility level for federal benefits and those benefits being reduced or cut;
- the need for universal health care for all persons, including those with disabilities;
- continued rent subsidies for persons with disabilities, since this is one of the largest monthly costs to persons with disabilities; and
- the lack of a larger community network of support for such problems as transportation to and from work sites and persons to talk with about workplace problems.

While the Consortium members, as a group, identified the need for a systems-wide change in the federal benefits structure to increase employment among persons with disabilities, they did not see this happening anytime soon.

SUMMARY

Using data from the client satisfaction survey and client interviews and interviews with benefits specialists and consortium members allowed for the examination of the six evaluation questions posed during this reporting period. It is clear from the results that clients receiving benefits counseling are very satisfied with the services they received.

In general, clients talked about *Project CLIMB* very positively. A number of clients specifically noted that *CLIMB* had given them an opportunity to move forward with their lives. One client stated that “She (the *Project CLIMB* counselor) gave me the confidence to change my life.” This was after the client had been participating in “a life of crime.” Another client stated that her benefits counselor “was very helpful and I wish more people knew about this.” Finally, one client stated that “*CLIMB* should be mandatory for all DVR clients.”

The results of this year’s Client Satisfaction Survey indicate that of the limited percentage (19%) of clients who used the WorkWORLD, approximately 85% found the software helped them understand the impact of working on their net income at least a fair amount. Unfortunately, none of the clients who were interviewed had used WorkWORLD during their counseling session.

While only about 29% of survey respondents were working at the time they completed their survey, approximately 87% of those interviewed said they had had some employment opportunities since the acquisition of their disability. In addition, a large minority (45%) of the interviewees agreed that they were better prepared to

seek work and to balance work with their health care, housing, and other benefits due to their counseling sessions through Project CLIMB.

The client interviews allowed for a more in-depth analysis of the barriers and incentives to employment. Interview results support findings from Year 2 that criminal history, disability discrimination, intermittent health problems, lack of math skills, lack of specific training for current job market, low paying jobs and losing disability benefits, transportation issues and unsupportive work environments are barriers to employment for clients. Interview data also helped answer the question regarding what incentives facilitate employment. Clients listed reliable transportation, earning additional degrees or certificates and decreased disability stigma/discrimination as supportive influences for permanent employment.

It is clear from the interviews with benefits specialists and consortium members that the state and federal policies affecting the ability of individuals with disabilities to be gainfully employed need some significant changes to make it easier for them to move comfortably into the work force. However, neither group believes that these changes will occur in the near future, despite the effort they are putting forth through Project CLIMB.

The evaluation results clearly indicate that clients are pleased with the services being provided by Project CLIMB and that they are frustrated with some of the federal and state policies affecting their ability to work. The benefits specialists and consortium members appear equally frustrated with the barriers that impede individuals with disabilities from working. There are, however, some areas of the project and this evaluation that would benefit from further exploration. The final year of the project, with its more summative evaluation focus, should illuminate the degree to which the project has accomplished its goals.

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APPENDIX A:
CLIENT INTERVIEW PROTOCOL

Project CLIMB Client Interview Protocol

Client's Name: _____

Address: _____

Phone: _____ County: _____

Date of Birth: _____ Disability/diagnosis: _____

Disability description: _____

Data Collector's Name: _____

Date of Interview: _____

Thank you for agreeing to participate in this study and for your time in answering the questions in this interview.

Signed Informed Consent Form

The responses to your questions will provide us with important information about employment for persons with disabilities. We will begin the interview with background information about you, your family and your disability(ies). The interview will then move to the topics of benefits, benefits counseling, barriers to employment, and ideas that you might have to support those looking to be fully employed.

Please remember that you can ask that the interview end at any time and you can ask that any information that you have provided be destroyed. As an additional reminder, the information you provide will be kept confidential. You will not be identified by name, address, geographical location or disability type and any comments that you make may be slightly altered when reported to protect your identity.

Do you have any questions or comments before we begin?

Section I: Background Information

1. What is the primary language that you speak at home? _____
2. Are there any other languages spoken at home? _____
3. What is your household income? _____ per _____
Amount Year/month/week/hour

(To the interviewer)

- *If the income is given in month/week/hour, about how much does the family work? (Enough information to calculate an annual salary)*
- *Whose income is included in the annual income amount? If there are part-time jobs, two people working, child support - all of this income should be included.*

4. Tell me about your education. Which schools did you attend, when, and tell us if you received a degree, certificate or other type of graduation diploma from the school. Please start with the school you attended most recently.

Education History:

School	Dates Attended	Grades/Levels	Degree/Certificate?

5. Have you ever lived with relatives or friends, in a motel, in a shelter, or someplace else because you did not have another place to live? a. YES b. NO

6. How many times have you moved since acquiring your disability? _____

7. Tell me about these moves. When was the most recent move?

Date: _____ From: _____ To: _____

What was the reason for this move? _____

Second most recent move:

Date: _____ From: _____ To: _____

What was the reason for this move? _____

Third most recent move:

Date: _____ From: _____ To: _____

What was the reason for this move? _____

8. What type of transportation do you use to get where you need to go such as going to work, the doctor, shopping, or visiting family or friends?

(To the interviewer) Do they own a car? Do they use public transportation? Which service? Do they rely on family or friends? Do they walk or ride a bicycle?

Section II: Disability Information

I am now going to ask some questions about your disability and employment; such things as when you acquired it and the types of jobs you have had.

9. What is your diagnosed disability? _____

10. When did you acquire your disability? _____

11. (age 16 or older for #13; otherwise go to #16) Were you employed when you became disabled? _____

12. What employment have you had since acquiring your disability? Please start with your most recent job.

Place of Employment	Position Held	Rate of Pay	Dates of Employment	Number of Hours Employed Each Week

13. What was your employment history prior to your disability?

Place of Employment	Position Held	Rate of Pay	Dates of Employment	Number of Hours Employed Each Week

Section III: Benefits

This next section includes questions about the benefits that you receive. I will ask about specific types of benefits that you might receive.

14. Supplemental Security Income (SSI)

- Do you receive income from the Supplemental Security Income (SSI) program? _____
- If yes, when (what month and year) did you begin to receive benefits? _____
- Have you ever had an interruption in your SSI income? _____
- If yes, for what reason(s)? _____

15. Supplemental Security Disability Income (SSDI)

- a. Do you receive income from the Supplemental Security Disability Income (SSDI) program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your SSDI income? _____
 - d. If yes, for what reason(s)? _____
-

16. Medicaid

- a. Do you receive benefits from the Medicaid health insurance program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your Medicaid? _____
 - d. If yes, for what reason(s)? _____
-

17. Medicare

- a. Do you receive benefits from the Medicare health insurance program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your Medicare? _____
 - d. If yes, for what reason(s)? _____
-

18. Section 8 Housing Benefits

- a. Do you receive benefits from the Section 8 Housing program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your Section 8 support? _____
 - d. If yes, for what reason(s)? _____
-

19. Temporary Assistance for Needy Families (TANF)/Delaware's A Better Chance (ABC)

- a. Do you receive benefits from the TANF/ABC program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your TANF/ABC support? _____
 - d. If yes, for what reason(s)? _____
-

20. Food Stamps

- a. Do you receive benefits from the food stamps program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your food stamps? _____
 - d. If yes, for what reason(s)? _____
-

21. Workers' Compensation

- a. Do you receive income from the Workers' Compensation program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your Workers' Compensation income? _____
 - d. If yes, for what reason(s)? _____
-

22. Unemployment Insurance

- a. Do you receive income from the Unemployment Insurance program? _____
 - b. If yes, when (what month and year) did you begin to receive benefits? _____
 - c. Have you ever had an interruption in your unemployment insurance income? _____
 - d. If yes, for what reason(s)? _____
-

Section IV: Medical Insurance

The questions in this section have to do with your medical insurance.

23. Do you have health insurance? a. YES b. NO
- a. **If yes**, what insurance company is it? (Prompt: Blue Cross/Blue Shield/ Coventry/ AmeriHealth/Medicaid – State Chips Program) _____
-

24. Has your health insurance ever changed? a. YES b. NO
- a. **If yes**, why did the health insurance change? (Probes for why these changes occurred: found out about better plan; changed job; employment status changed; moved) _____

25. Have there been times since you acquired your disability that you did not have health insurance?
a. YES b. NO

a. **If yes**, what were those times and were there health or medical needs that were not covered? _____

Section V: Project CLIMB Services

26. Describe the services and supports you have received through Project CLIMB: _____

27. When did you receive these services? _____

28. After receiving benefits counseling, did you have a better understanding of the requirements of the various state and federal benefits programs? _____

Tell me how your understanding changed: _____

29. After receiving benefits counseling, did you decide to change whether or not you looked for work?

If so, what was your decision and why? _____

30. After receiving benefits counseling, did you feel that you were better prepared to get work and to be able to stay in work? _____

31. After receiving benefits counseling, did you get a job and, if so, how long did you or have you stayed in that job? _____

32. When you received benefits counseling, did the counselor use the computer programs
“WorkWORLD” to help you with information about being employed? YES NO

If, “YES,” how did the program help you? _____

33. After benefits counseling, did you have a better understanding of how becoming employed
would effect the benefits you received? _____

Tell me how your understanding changed: _____

34. Describe what you thought were the strengths of the counseling you received: _____

35. Describe how the benefits counseling could have been improved: _____

Section VI: Supports and Barriers to Employment

36. In your opinion, what has or what would help you to be permanently employed? _____

37. In your opinion, what have been or are the barriers to you becoming permanently employed? _____

38. In your opinion, what has or what would help you to be permanently employed? _____

Section VII: Closing Questions

We have a couple of last questions to ask you.

39. How likely is it that you will be employed at least for 20 hours per week by this time next year?

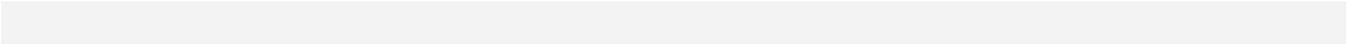
Why do you say that? _____

40. How likely is it that you will be employed for about 40 hours per week by this time next year? Why do you say that? _____

41. What do you think will have the greatest influence on your ability to be employed? _____

42. Is there anything else that you would like to add or comment on?

Thank you for taking the time to talk with me. Please remember that if you have any questions about the interview you can call me at the number on the informed consent form. Also, if you change your mind about us using the information you have provided, please call. We greatly appreciate your participation in this evaluation of Project CLIMB.



APPENDIX B:

BENEFITS SPECIALIST AND CONSORTIUM MEMBER INTERVIEW PROTOCOL

Project CLIMB Personnel Interview Protocol

Name: _____

Affiliation(s) with the CLIMB to Employment Project: _____

Affiliation(s) with other organizations or programs: _____

Address: _____ County: _____

Phone: _____ E-mail: _____

Data Collector's Name: _____

Date of Interview: _____

Thank you for agreeing to participate in this study and for your time in answering the questions in this interview.

Signed Informed Consent Form

The responses to your questions will provide us with important information about employment for persons with disabilities. The interview will cover topics of benefits, benefits counseling, barriers to employment, and ideas that you might have to support those looking to be fully employed.

Please remember that you can ask that the interview end at any time and you can ask that any information that you have provided be destroyed. As an additional reminder, the information you provide will be kept confidential. You will not be identified by name, address or geographical location and any comments that you make may be slightly altered when reported to protect your identity.

Do you have any questions or comments before we begin?

Section I: Project CLIMB Services

1. Describe the services and supports received by your clients through Project CLIMB: _____

2. How do they get access to these services? _____

3. After your clients receive benefits counseling, do you think they have a better understanding of the requirements of the various state and federal benefits programs? _____
Tell me how their understanding changes: _____

4. After benefits counseling, do you think they have a better understanding of how becoming employed would affect the benefits they receive? _____
Tell me how their understanding changes: _____

5. Describe what you think are the strengths of the counseling received by CLIMB consumers: _____

6. Describe how the benefits counseling could have been improved: _____

Section II: Supports and Barriers to Employment

7. In your opinion, what has or what would help individuals with disabilities to be permanently employed? _____

8. In your opinion, what have been or are the barriers to individuals with disabilities becoming permanently employed? _____

9. In your opinion, what has or what would help individuals with disabilities to be permanently employed? _____

Section III: Closing Questions

We have a couple of last questions to ask you.

10. How many of your clients do you know have been employed at least for 20 hours per week so far? _____

11. How many of your clients do you know have been employed at least for 40 hours per week so far? _____

12. What do you think has the greatest influence on your clients' ability to be employed?

13. What do you think are the current benefits and concerns of state policy and laws related helping individuals with disabilities to become employed and to stay employed?

14. What do you think are the current benefits and concerns of federal policy and laws related to helping individual with disabilities to become employed and to stay employed?

15. What do you think is the impact of the Project CLIMB Benefits Consortium and the Consumer Advisory Board on state and federal policies related to helping individuals with disabilities to become employed and to stay employed?

16. Is there anything else that you would like to add or comment on?

Thank you for taking the time to talk with me. Please remember that if you have any questions about the interview you can call me at the number on the informed consent form. Also, if you change your mind about us using the information you have provided, please call. We greatly appreciate your participation in this evaluation of Project CLIMB.

Reflections: (for interviewers only)

1. How did I do in this interview? What could have gone better? What went really well?

2. How accurate do I feel the information is? Is there anything I was unsure of or felt uneasy about?

APPENDIX C:
REVISED CLIENT SATISFACTION SURVEY AND RESULTS

CLIMB TO EMPLOYMENT
CLIENT SATISFACTION SURVEY

Dear Participant,

This survey is being conducted by the University of Delaware Education Research & Development Center, an independent research and evaluation organization, at the request of CLIMB to Employment. The purpose of the survey is to determine clients' perceptions about the benefits counseling they received. Your feedback is very important. You will not be identified in our analyses. The CLIMB to Employment project will receive a summary report of the group data. Also, each of the benefits specialists will receive a summary of the data for their region as feedback to help them improve their services.

The survey has been designed so that you can complete it quickly and easily. A postage-paid envelope has been included for your convenience. Please return the survey as soon as possible in the enclosed postage-paid envelope.

Thank you for your time and for sharing your experiences and thoughts. If you have any questions about this survey or if you would like a copy of the annual report, please contact the Delaware Education Research & Development Center by email at ud-rdc@udel.edu or by phone at [302/831-4433](tel:3028314433).

Sincerely,

Cheryl M. Ackerman, Ph.D.
Senior Associate for Evaluation
Delaware Education Research & Development Center

PART A: Perceptions about Benefits Counseling

- | | |
|--|--|
| <p>1. How <u>understandable</u> was the information presented by the benefits specialist? (n=142)</p> <p>74.1% Very easy to understand
22.4% Somewhat easy to understand
2.8% Not very easy to understand
0.7% Not at all easy to understand</p> | <p>4. How much did WorkWORLD help you understand the impact of working on your net income? (n=27)</p> <p>48.1% A great deal
37.0% A fair amount
11.1% A little
3.7% Not at all</p> |
| <p>2. How <u>useful</u> was the information provided by the benefits specialist? (n=142)</p> <p>83.1% Very useful
14.8% Somewhat useful
1.4% Not very useful
0.7% Not at all useful</p> | <p>5. Did your benefits specialist offer you Budget Training? (n=129)</p> <p>48.8% Yes
51.2% No (go to #8)</p> |
| <p>3. Was the computer software program WorkWORLD used during your counseling session(s)? (n=109)</p> <p>19.3% Yes
80.7% No (go to #5)</p> | <p>6. Did you receive Budget Training?</p> <p>36.1% Yes
63.9% No (go to #8)</p> |

7. How helpful was Budget Training?(n=116)
- 82.1% Very helpful
 - 17.9% Somewhat helpful
 - 0.0% Not very helpful
 - 0.0% Not at all helpful
8. How much of the information provided by the benefits specialist was new to you? (n=140)
- 44.3% All of it was new
 - 30.0% Most of it was new
 - 23.6% Some of it was new
 - 2.1% Very little of it was new
 - 0.0% None of it was new
9. How understandable were the materials given or mailed to you by your benefits specialist? (n=143)
- 57.3% Very understandable
 - 39.2% Somewhat understandable
 - 2.1% Not very understandable
 - 0.0% Not at all understandable
 - 1.4% My benefits specialist did not give me any materials.
10. How likely is it that you will use the information provided by the benefits specialist? (n=144)
- 81.9% Very likely
 - 17.4% Somewhat likely
 - 0.0% Not very likely
 - 0.7% Not at all likely
11. How much did the benefits counseling session help you understand how employment would affect your benefits? (n=142)
- 82.4% Very much
 - 16.2% Somewhat
 - 0.7% Not very much
 - 0.7% Not at all
12. How concerned are you about losing your benefits if you make a change in your employment? (n=140)
- 64.3% Very concerned
 - 22.1% Somewhat concerned
 - 9.3% Not very concerned
 - 4.3% Not at all concerned
13. How has your concern about losing your benefits changed since meeting with the benefits specialist? (n=138)
- 34.1% I am much less concerned.
 - 35.5% I am a little less concerned
 - 5.8% I am a little more concerned
 - 10.9% I am much more concerned
 - 13.8% My concern has not changed.
14. If you have more questions later, do you know how to contact your benefits specialist? (n=140)
- 98.6% Yes
 - 1.4% No
15. How likely is it that you will contact your benefits specialist in the future? (n=140)
- 73.6% Very likely
 - 22.9% Somewhat likely
 - 2.9% Not very likely
 - 0.7% Not at all likely
16. How likely is it that you would recommend this service (benefits counseling) to others? (n=141)
- 91.5% Very likely
 - 6.4% Somewhat likely
 - 1.4% Not very likely
 - 0.7% Not at all likely
17. Overall, how satisfied are you with the benefits counseling you received? (n=141)
- 83.0% Very satisfied
 - 14.2% Somewhat satisfied
 - 1.4% Somewhat dissatisfied
 - 1.4% Very dissatisfied

PART B: Demographic information

18. Are you a student? (n=141)
- 16.3% Yes
 - 83.7% No
19. What is your current employment status? (n=135)
- 28.9% Employed
 - 57.8% Not employed, looking for work
 - 13.3% Not employed, not looking for work
20. Does your employer provide you with a health insurance package? (n=49)
- 20.4% Yes
 - 79.6% No
21. What is your age? _____ years

22. What is your gender? (n=143)

- 42.7% Male
- 57.3% Female

23. Which best describes your race or ethnicity? (n=141)

- 56.0% White, non-Hispanic
- 38.3% African American
- 0.7% Hispanic
- 1.4% Asian/Pacific Islander
- 0.7% Native American/Alaska Native
- 2.8% Mixed ethnicity

24. What is the highest level of education you have completed? (n=141)

- 15.6% Less than high school graduate
- 34.0% High school graduate/GED
- 31.2% Some college or technical school beyond high school
- 3.5% Associates degree
- 12.1% Bachelors degree
- 3.5% Advanced college degree

PART C: Additional thoughts

25. Please indicate whether the following would make the benefits counseling experience more effective.

	Yes	No	Don't Know
A more convenient <u>location</u> (n=116)	24.1%	66.4%	9.5%
A more convenient <u>time</u> (n=114)	14.0%	74.6%	11.4%
A <u>longer</u> counseling session (n= 117)	23.9%	62.4%	13.7%
A <u>shorter</u> counseling session (n=115)	7.8%	77.4%	14.8%
Getting an appointment <u>sooner</u> (n=118)	33.9%	50.8%	15.3%
Additional session(s): (n=92)	39.1%	25.9%	25.0%
Other(s) - please describe:			

26. What are your plans for future employment?

27. Please use the remaining space and the back of this page for additional comments about the benefits counseling you received.

Please return your completed survey in the enclosed postage-paid envelope as soon as possible.

Thank you for your time and effort in completing this survey.

APPENDIX D:
**ADDENDUM OF BENEFITS SPECIALIST AND CONSORTIUM MEMBER
INTERVIEW RESULTS**

Project CLIMB Benefits Counselors

Three of the four *Project CLIMB* benefits counselors were interviewed for this project evaluation. As in the past, the benefits counselors were very willing informants about the project and provided extensive detailed information about the activities of the project as well as their perceptions about how their clients used the information provided.

The counselors indicated that they provided benefits counseling about the impact of employment on their clients' eligibility for federal and state benefits such as Medicaid and Social Security. They also stated that when conducting counseling sessions they were able to explain the different benefits programs and, on occasion, help a client to enroll in a program which they had not applied for in the past.

The benefits counselors stated that they made persons with disabilities and their families aware of the *Project CLIMB* services through community workshops, flyers, word of mouth, and orientation sessions for DVR employees and clients. The counselors thought that these strategies for making the public aware of their services were effective.

The counselors all felt that the persons with disabilities they worked with had a better understanding of the impact on eligibility for services of working after the clients had received benefits counseling. Specifically, the counselors stated that their clients were more aware of the eligibility requirements for specific federal and state programs, clients were able to identify how to increase their overall standard of living by balancing work and eligibility for benefits, and that overall they had "more options for work."

The counselors all felt that their clients had a better understanding of the impact of earning additional income on their federal and state benefits. This, however, did not always result in clients being more likely to enter or re-enter the workforce. As one counselor said, clients' understanding of the impact of additional income on benefits made it, in some cases "not in their best interest to go to work."

The counselors were able to identify a number of specific services and activities that they felt were especially useful to persons with disabilities. These included:

- the summary letter received by each client after their counseling session outlining the impact of working on their individual eligibility for specific benefits;
- the continued access to benefits counselors as clients considered different types of employment;
- the independence of the benefits counselors and the level of trust and openness about eligibility for benefits; and
- the confidentiality of the *Project CLIMB* services.

Since the 2003 evaluation of the *Project CLIMB* services, the benefits counselors identified that the increased number of counselors and the increase in support staff have allowed the counselors to meet with and provide services to more clients. Specifically, the staff support has been very beneficial to more individuals with disabilities.

The benefits counselors identified a number of changes that they felt could increase the likelihood of employment of persons with disabilities:

- employers offering health care benefits for minimum and lower paying jobs as well as part-time jobs;
- better transportation to work places, especially for those with physical limitations;
- more flexible work hours and work tasks for persons with disabilities; and
- the availability of better paying jobs for persons with disabilities.

Benefits counselors clearly felt that the likelihood of their clients with disabilities entering or re-entering the job market was dependent upon two major variables: their clients' attitudes and motivation about work and the benefits structures, especially for federal benefits. The counselors felt that the activities of *Project CLIMB* were able to address some of the motivation and attitude variables for individuals with disabilities and to provide them with information and knowledge about their benefits. They also felt, however, that they had little or no control over the state and federal benefits structures and that until those changed, the likelihood of increasing employment among persons with disabilities was very low.

Project CLIMB Consortium Members

Seven of the *Project CLIMB* Consortium members were interviewed for the project evaluation. This is an increase of Consortium members interviewed from the three interviewed in 2003. Unlike the 2003 interviews, this set of Consortium members were very willing to talk about the project and were well informed about the activities of the project.

When asked about the over-all benefits of the counseling that the clients received, the Consortium members identified the Benefits Counselors and their specific services as the most important component of the Project. Additional benefits included the impact on employment rates and the side-benefit of assisting clients to be motivated to enter or re-enter the employment market. However, it was clear that the Consortium members highly valued the information that was shared with clients about employment and the impact employment would have on their federal and state benefits.

The Consortium members, like the clients themselves, identified the benefits counselors as a strength of the project. They indicated that the counselors were able to motivate clients to consider work and to examine the impact work would have on the benefits they received. The members also stated that the relationships between the benefits counselors and the clients were "good interactions," "honest," and "knowledgeable."

The Consortium members stated that they felt that clients did better understand how their employment would have an impact on their benefits. One Consortium member stated that clients "are not interested in regulations, only in who it will impact their pocketbook." They clearly felt that clients better understood the impact that being employed would have on their benefits. The Consortium members were aware of the process for referring clients for the benefits counseling under *Project CLIMB* and some personally had made referrals to the DVR project.

Consortium members did make a number of suggestions for improving the benefits counseling. Their number one suggestion was to tie the *Project CLIMB* benefits counseling to the eligibility processes of the federal and state programs, specifically to Social Security and Medicaid

eligibility. They also suggested that there be periodic follow-up for all clients receiving DVR services and more outreach to clients who may not be active DVR clients. Finally, Consortium members also suggested that all DVR staff receive training about the impact of employ on benefits from the *Project CLIMB* benefits counselors.

Because the Consortium members are from employment agencies, local employers and supported employment agencies, they have significant knowledge about the barriers to employment for persons with disabilities. The number one barrier identified by the Consortium members for persons with disabilities being employed remained the loss of federal benefits due to income earned through employment. The Consortium members emphasized that the information and knowledge communicated by the benefits counselors was important, however, many clients use the information to decide not to work, since they will need to make significantly higher salaries to replace health insurance, housing, and other benefits. One Consortium member stated that the incomes of a person with a disability needed to be far above the minimum wage to recoup the likelihood of lost benefits and thoughts that “work incentives like a fifty cent reduction in benefits for every dollar earned” would help increase employment.

The Consortium members identified additional barriers to employment of individuals with disabilities as well. These included:

- the need for more transition time between earning a salary above the eligibility level for federal benefits and those benefits being reduced or cut;
- the need for universal health care for all persons, including those with disabilities;
- continued rent subsidies for persons with disabilities, since this is one of the largest monthly costs to persons with disabilities; and
- the lack of a larger community network of support for such problems as transportation to and from work sites and persons to talk with about workplace problems.

While the Consortium members, as a group, identified the need for a systems-wide change in the federal benefits structure to increase employment among persons with disabilities, they did not see this happening anytime soon.

In conclusion, while the Consortium members valued the counseling provided by the benefits counselors and the activities of *Project CLIMB*, as a group, they were not sure that the counseling actually helped to increase employment among persons with disabilities.

APPENDIX E:
EVALUATION PLAN – SCOPE OF WORK

EVALUATION OF CLIMB TO EMPLOYMENT PROGRAM
YEAR 2 SCOPE OF WORK (JANUARY 1, 2004 – JUNE 30, 2005)

Project Goal: Improving the ability of individuals with disabilities to make informed choices during the employment process.

Evaluation Question	Data Collection	Data Analysis	Reporting	Notes
1. To what degree is the CLIMB to Employment Program providing clients with the knowledge to make wise financial decisions regarding employment and household budgeting?	Survey	Quantitative and Qualitative	October 2004	Additionally, this data will be disaggregated on a quarterly basis by benefits specialist as formative feedback. It will be distributed only to these individuals.
	Client Interviews	Qualitative	Summer 2005	
2. What is CLIMB clients' knowledge about WorkWORLD as a resource?	Survey	Quantitative and Qualitative	October 2004	See above.
	Client Interviews	Qualitative	Summer 2005	
3. To what degree are clients seeking, obtaining, and retaining employment?	Structured Database	Quantitative	October 2004	
	Client, Consortium and Benefits Specialist Interviews	Qualitative	Summer 2005	

Project Goal: Recommend changes to rules and regulations that have a negative impact on employment outcomes.

Evaluation Question	Data Collection	Data Analysis	Reporting	Notes
4. What are CLIMB clients' perceptions of the incentives to and barriers against their entering the world of work?	Structured Database	Quantitative	October 2004	
	Client Interviews	Qualitative	Summer 2005	
5. What is the current status of state and federal policies on the ability of individuals with disabilities to become employed, stay employed, and to live independently?	Consortium and Benefits Specialist Interviews	Qualitative	Summer 2005	
6. What is the impact of the creation of a Benefits Consortium and a Client Advisory Board on state and federal policies affecting the ability of individuals with disabilities to become employed, stay employed, and to live independently?	Consortium and Benefits Specialist Interviews	Qualitative	Summer 2005	