

Success Stories and Survey Results from California's *Individual Self-Sufficiency Planning (ISSP)* Project

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Being *Successful* Brings Other Beneficial Change

Reality [a pseudonym] said it was hard for him to see the differences in his life. Others can see, better than he can, he said. So, I asked whether he would mind if his daughter shared her perceptions of the change. Reality said "sure." Compared with the past, his daughter said that her father:

- *is more confident;*
- *is more excited about things (e.g., going to work);*
- *is a better father and a better friend;*
- *is a great listener; and*
- *cares more about himself (appearance, etc.) and those around him.*

-- Personal interview by one of the Evaluators

Acknowledgments

We want to thank a number of ISSP project participants for sharing their *stories*, and others for responding by mail or telephone to a survey. We are deeply indebted to the men and women who we had the privilege of interviewing in August 2004. Steve and I came away marveling at their tenacity and resilience. We wish this wonderful group of fellow citizens the very best in the years ahead. All participant names have been replaced with pseudonyms to protect privacy.

We also want to express our gratitude to Amy Allen, who did a fine job interviewing non-respondents to our mail questionnaire survey. She received brief training before undertaking the work. She practiced with John Shea and her parents, both of whom have a background in counseling and mental health. Training emphasis was on establishing and maintaining rapport, understanding how to ask the questions, listening carefully and recording what was said, and probing in ways to avoid influencing the respondent's message.

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Contents

	<u>Page</u>
Acknowledgments.....	3
Executive Summary	7
Background	9
Methods.....	9
Findings.....	11
Deciding to Enroll in the Project	11
Helpful Services	13
Work, Earnings, and Benefits.....	27
Onset and Work History	27
Work Ethic, Growing Up.....	29
What Accounts for Success; Advice to Others	30
Policy and Practice Implications	33
Individuals and Advocates.....	34
Specialized Employment Services	36
Social Security Administration.....	40
 Appendices	
Appendix A. Interview Schedule.....	47
Appendix B. Success Stories	51
Appendix C. Mail/Telephone Questionnaire	95
Appendix D. Pamphlet Accompanying Questionnaire	97
Appendix E. Questionnaire Survey Results.....	99

Success Stories and Survey Results from California's *Individual Self-Sufficiency Planning (ISSP) Project*

Executive Summary

This report contains a number of *success stories* from participants in the ISSP project, along with the results of a mail/telephone survey of essentially *all* participants, current and past. Nineteen full stories are included, along with survey results from 106 respondents to the questionnaire survey and parts of stories from nine other interviewees. The purpose of the personal interviews and the questionnaire survey has been to learn from participant experiences and to close a chapter (the ISSP project) in participant lives.

Findings

Project Enrollment. -- Regarding factors prompting enrollment in the ISSP project, interviewees mentioned most frequently Learning about the project from ISSP staff, mental health counselors, and/or project participants. Getting help finding (or keeping) a job and Having a higher income (e.g., through SSI waivers) were also common themes. Survey respondents rated highly (1) "My own personal interest and motivation," (2) "Economic necessity," and (3) "Possibility of Social Security 'waivers.'" Family and friends were rated least important, with "MD or counselor advice" in-between.

Most Useful Services. -- Survey respondents were asked to rate on a 10-point scale a specified set of eight services. All were ranked highly, with the lowest mean score 7.9 for Vocational (career) counseling. The three highest rated were (1) Accessing (or, maintaining) public benefits (e.g., Social Security, food stamps, housing); (2) Mental health services (e.g., medication, therapy); and (3) Help keeping a job, or progressing in a career. Interviewees most often mentioned Dealing with Social Security (e.g., overpayments, wage reporting, problem-solving).

Things [about the project] especially liked, things not liked or that could have been better. -- Many more survey respondents mentioned something *especially liked* than *not liked* or *could have been better*. Nearly three-fifths of positive remarks were in the category of "helpful or supportive staff, in general." Under the *could have been better* rubric, the category with the most remarks was "work, job, employment, training." In second place was expressed disappointment about the ending of the project.

Work, Earnings, and Benefits. -- For 26 of the 27 interviewees, using reported earnings in July 2004, along with SSA benefit information, we were able to assess the dollar (and percentage) impact of *return to baseline* (i.e., ending of the \$3 for \$4 SSI waiver). The biggest absolute change will be \$336.50 per month for Wayne, who earned \$1,899 in July 2004. The smallest absolute and percentage change will be for Anthony (\$18.50 per month, or -0.6%), who earned \$3,171 last July. The largest percentage changes in total income (-17.7% in both cases) will be for two participants whose earnings were very close to the cash cut-off point under the \$1 for \$2 rule.

Success Stories and Survey Results

Onset, Work History. – Interviewees gave us their recollections of work before onset of mental illness and subsequently. Most were diagnosed with a psychiatric disability as adolescents or young adults. Many could identify difficulties earlier in life. For some, inability to stay employed was a *sign* that something was wrong. Among the 27 stories, there are expected differences in work histories related to current employment and earnings.

Work Ethic, Growing Up. – In both *success stories* and in questionnaire responses, one finds – with very few exceptions – that most participants grew up in regular families (typically, two parent), and that most received clear messages that both schooling and work would be important for their futures.

What Account for Success; Advice to Others. – Interviewees were asked what factors may have made a difference in their employment success. Nearly all mentioned (1) *positive behavior and attitudes*. Somewhat fewer mentioned (2) *dealing successfully with mental illness*; (3) *persistence, tenacity or drive*; and (4) *using available services and supports*. In fifth place were remarks about (5) *faith, spirituality, or philosophy*.

Policy and Practice Implications

Individuals and Advocates. – The central suggestions seem to be (1) managing mental illness well; (2) developing and maintaining motivation, drive, and associated attitudes and behavior; and (3) using available services and supports to accomplish one's goals.

Specialized Employment Services. – Key recommendations include (1) having services and supports available to help with return to work; (2) individualizing services; (3) being accessible and wisely responsive to service users; (4) developing 'systems' for those returning to work to assist them in becoming more self-reliant; and (5) working effectively with others.

Social Security Administration Policy. – We reiterated a recommendation in our *Revised Interim Report* regarding the SSDI SGA *cliff* issue, calling for simplification (e.g., getting rid of the Trial Work Period and EPE), and "taxing" (through reduced SSDI cash benefits) earnings above a variable level based on earnings prior to disability. We describe the many different ways individuals are likely to respond to the end or the \$3 for \$4 SSI waiver. We suggest greater emphasis on wealth acquisition through IDAs, IAs, and raising of the \$2,000 countable resource limit. Based on interviews and survey results, we make a case for (1) disengaging publicly-funded health insurance from SSA benefit status; (2) testing enhanced work incentives to attract and retain individuals in vocational rehabilitation and employment status (a change from our recommendation in the *Revised Interim Report*); and (3) testing use of enhanced work incentives (e.g., \$3 for \$4 and savings accounts) contingent on effort and accomplishment, with time limitations. Finally, regarding fear of loss of benefits from working, we recommend outreach efforts within disability communities to change pervasive points of view toward work and greater self-sufficiency.

Nineteen *success stories*, in detail, can be found in Appendix B. Questionnaire survey results, beyond those in the text, are in Appendix E. The other appendices show instruments and a pamphlet accompanying the mail questionnaire.

Background

At its meeting in June 2004, the Statewide Coordinating Committee for the ISSP project asked the project evaluators to do two things: (1) interview a number of successful project participants; and (2) survey all present and past participants, to acknowledge the end of the project and to learn from their experiences.

What One Person Got from the ISSP Project

The ISSP program gave all of us that were involved one of the biggest reasons to get better (health wise). The biggest reason was believing in myself again. It gave me a dream for the future. The program was the best thing Social Security ever had to offer people on SSI.

-- Respondent to Mail/Telephone Survey

Methods

We asked project staff at the two sites, Vocational Rehabilitation Services (VRS) in San Mateo County and On-Track Employment Services (OTES) in Kern County, for help in identifying participants who had been successful and who would consent to interviews to get *success stories*. After some discussion of *dimensions of success*, interviews were arranged with 27 individuals: 10 at Kern County, and the rest at the larger project site in San Mateo.

We sought interviews with individuals who had been *economically successful*, in terms of employment, earnings, career advancement, and reduced reliance on Social Security benefits. We agreed with the sites on two things. First, there are multiple dimensions of *success*, involving best possible health, good citizenship, relationships with others, living more independently (e.g., in own home), success in raising a family, and the like. Second, we acknowledged that *success* should be person-referenced. Some

Success Stories and Survey Results

individuals have a lot going for them (e.g., solid work history, higher education, supportive family) and one may reasonably expect more from such individuals than from someone with fewer “assets,” facing higher barriers to economic success. We clarified that we wanted to talk with individuals who were *economically successful*, because of the interests of the Social Security Administration in reducing the outflow of transfer payments from the Social Security Trust Fund and general taxpayer to individuals with disabilities.

We developed an Interview Schedule, had it reviewed by the sites and members of the Statewide Coordinating Committee, and revised it accordingly. A copy can be found in Appendix A. One will see in both that instrument, and in the mail/telephone questionnaire (Appendix C), an interest in *messages* sent both verbally and by behavior to the participants when they were teenagers. This is because of an interest in knowing whether inculcation of a *work ethic* at an early age makes a difference in later economic success. We knew, in advance, of course, that responses to the questions about messages received regarding work and school would not answer the question posed, because we were not interviewing participants who were less successful economically to get comparison responses. Nevertheless, we think the information is of interest.

Personal interviews at site offices lasted anywhere from about half-an-hour to two hours, with the typical interview being completed in an hour. The questionnaire was mailed to nearly everyone on lists provided by the sites. Questionnaires went out in envelopes with site return addresses, cover letters signed by site leaders (Farrell and Manchia) and John Shea, with an explanatory pamphlet (Appendix D), a self-address and stamped return envelope addressed to Allen, Shea & Associates, and a slip with names of phone numbers of ISSP staff if the respondent wanted assistance in completing the survey.

For the questionnaire survey, our initial list had 293 names and addresses – 155 from the San Mateo site, and 138 from Kern. A few names had been removed, because the person left the project and area, and no forwarding address was available. Of 138

Success Stories and Survey Results

questionnaires sent out to Kern County site participants (current and past), 18 envelopes (13%) came back, undeliverable. Of the 120 that presumably got to the person, 21 (18%) responded by mail, and an additional 19 (16%) were interviewed by telephone, giving an overall response rate of 33%. Of 155 questionnaires sent to San Mateo County site participants (current and past), 15 envelopes (10%) came back, undeliverable. Of the 140 that presumably got to the person, 44 (31%) responded by mail, and an additional 22 (16%) were interviewed by telephone, for an overall response rate of 47%.

Findings

Deciding to Enroll in the Project

When we interviewed individuals for *success stories*, Q1 asked: “How did you come to enroll in the *Individual Self-Sufficiency Planning (ISSP)* project? What factors prompted your looking at this option and deciding to enroll?”

Three themes were relatively common:

1. Hearing about the project from ISSP staff, mental health counselors, and/or other project participants;
2. Getting help finding (or keeping) a job; and
3. Being able to have a higher income (e.g., through SSI waivers).

A variety of other factors were mentioned, including but not limited to “getting extra support;” being involved in research; getting help with housing; and getting services from DOR.

Success Stories and Survey Results

Getting help finding or keeping a job was not the most important factor, perhaps because many participants, especially at San Mateo, were already employed at The Work Center, or in *temp, trainee* positions organized through Vocational Rehabilitation Services, or in regular jobs. The possibility of having (and keeping) more money when working was mentioned quite frequently. One interviewee seemed to recollect that the BC talked about the \$3 for \$4 waiver, but said that might have come later. He understood that when he was “ready to go to work,” the ISSP staff would help him look for a job. When he learned of the \$3 for \$4 waiver, this participant said: “It gave me the incentive to try to work.”

In the questionnaire survey, Q4 read: “How important (or, unimportant) were the following in your decision to enroll in the ISSP project?’ Respondents were given a 10-point scale from *Not important* (1) to *Very important* (10). The response pattern is shown in Table 1.

Table 1. Scores (Mean and Standard Deviation) on Importance of Various Factors in Decision to Enroll in ISSP Project

Factor	N	Mean	Standard Deviation
Family expectations	99	4.4	3.5
MD or counselor advice	98	5.7	3.5
Peer group or expectations of friends	97	4.1	3.3
My own personal interest and motivation.....	101	8.2	2.5
Economic necessity	96	7.6	3.0
Possibility of Social Security “waivers”	92	6.8	3.6
Other (please describe: _____).....	21	8.1	2.9

Aside from the relatively small number ($N=21$) who listed a “Other” factor, highest ratings (on average) were given to “My own personal interest and motivation,” “economic necessity,” and “possibility of Social Security ‘waivers.’” The lowest ratings were given to “Family expectations” and “peer group or expectations of friends.” “MD or counselor advice” ranked in-between.

Helpful Services

Questionnaire survey. -- Q6, in the mail/telephone questionnaire survey, asked about the usefulness of services. It read: “Please use check marks (II) to indicate (1) whether you received each service while in the ISSP project, and (2) if received, how useful each service was for you.” Respondents were given a 10-point scale from *Not at all useful* (1) to *Very useful* (10). The *N* is the approximate number who said Yes to the lead-in question, “Did you receive this service?” Means and standard deviations are based on the appropriate *N*. The response pattern is shown in Table 2.

Table 2. Scores (Mean and Standard Deviation) on Whether the Service Was Received, and If So, how Useful Was It

Service	<i>N</i>	Mean	Standard Deviation
Accessing (or, maintaining) public benefits (e.g., Social Security, food stamps, housing).....	63	9.1	1.7
Help finding a job (or, a better job)	52	8.2	2.3
Help keeping a job, or progressing in a career.....	48	8.8	1.8
Vocational (career) counseling	50	7.9	2.7
Help improving your health (e.g., symptom management)	47	8.4	2.0
Information and referral(s): e.g., housing, mental health, substance abuse services, etc.	46	8.3	1.9
Benefits/financial counseling and assistance	59	8.6	2.3
Mental health services (e.g., medication, therapy) ..	57	8.9	2.0
Other (please describe: _____).....	9	9.7	0.7

Half to two-thirds of participants said they used various services. In general, ratings (means) were very high. Again, aside from the small number who mentioned an “Other (describe)” service, the highest rating (9.1) was given to “Accessing (or, maintaining) public benefits (e.g., Social Security, food stamps, housing).” Close behind were “Mental health services (e.g., medication, therapy)” (average: 8.9) and “Help keeping a job, or progressing in a career” (8.8). The lowest score, but still quite high (7.9) was given to “Vocational (career) counseling.”

Things especially liked. -- Q7a asked: "Is there anything about the ISSP project (services, personnel) that *you especially liked?* IF SO, PLEASE DESCRIBE. Here are the things said, categorized by *first mentioned* remark (or, central idea). Some remarks are in the participant's own words; others, the interviewer, Amy Allen.

SSI waivers, income, assets

- To have some extra money for essentials that I probably could not afford.
- Yes, the 1 for 4 dollar waiver. It allowed me to save some money and buy items I would have had a hard time purchasing -- car, bicycle, 1 bed apt., tools, computer, stereo.
- Everyone that _____ worked with, especially Greg Wild, helped a lot, the 4-1 helped as well, and he was able to pick up extra hours of work. That program made all the difference in the world, he was able to keep a constant money flow, and gain extra income. He's sad that it's ending, and wished he could have had some more time with it. He wants to join a similar program.
- I liked being allowed to keep more money from my earnings.
- It really helped him save some money and helped him keep benefits. It also helped to encourage him to work. It was useful while it lasted.
- It really helped to be able to earn more money under this program. Now that I am considering working part time and going to school this coming year, I am really questioning whether it is worth it for me to work because I will not be receiving as much money. It's almost as if it would be a poor use of my time to work and be paid less, plus go to school full time. The extra money incentive really helped me last year. Also, I am not thrilled about working again this year because I'm the one that will have to deal with my pay stubs and Social Security. Last year my ISSP coordinator did it for me.

Social Security Administration, other benefit programs

- The benefits coordinators and their ability to help.
- The help with understanding letters sent of money owed SSI from working. Knowing I did have someone there to help me keep medical if I found a good job, but could not yet afford my medical expenses. I was told I would have help while making payments for Denti-Cal. This took away a lot of worry looking for work for me.

Success Stories and Survey Results

- The staff was very supportive if I had a problem. The accounting of my income to Social Security they provided each month was very helpful.
- The fact that they took out less from paychecks.
- My counselor, Joe Hennen, he was very knowledgeable about Social Security.
- The staff at VRS, especially Nancie Broman, helped in so many ways. Help with SSI letters and liaison between SSI was very helpful and in a timely manner.
- They helped me to know what the SSDI work incentives were. They helped me to know how to make monthly income reports to Social Security. They helped me to complete the medical reviews to Social Security.
- I truly valued having my counselor, Greg Wild, interceding for me with Social Security issues. It saved me much anxiety and confusion and hospitalizations due to depression. I also liked having some extra money for necessities.
- Help plus reminder to turn in work stubs. Soc. Sec. evaluations and help. Also, mental health and vocational counselors.
- A great help to me for Social Security business 'support,' sure going to miss them, got to move on.
- He appreciates Nancie Broman, she's very helpful. She has a nice personality. She helped with Social Security benefits and getting a job.
- SSI and counseling for assistance.

Work, job, employment, training

- Yes, Nancie Broman and Joe Hennen offered a lot of helpful support when issues occurred while I was working.
- The people were nice, helped him get back to work.
- I cannot say enough for the support of our friends Dennis Farrell, Carol Bowman and Angelina Quintana. However, it was my health that forced me to leave my job and not my mental disability. My knees just gave out. It was my desire to work and I was helped until my body gave out.
- They helped her fill out applications in the WRAP program.

Success Stories and Survey Results

- Job search, x training on job, motivating to stay on job.
- All the services that he received from Ms. Noah-Bear and Joe Hennen, Nancy's job coaching. He successfully went from one job to a better paying job. Darlene his vocational rehabilitation counselor helped with any problems that may have come up in the job. This year was bad for him, because of being in the hospital, he missed a lot of work. Joe Hennen helps with filling out forms for Social Security. Just about any public services that he received Joe helped him fill out forms. Douglas Smith helped considerably as well.
- She appreciated networking, 1 on 1 contact, and it was conceivable to be employed.
- The effort on work out of VRS work center was great.
- I could always call if needing boost of confidence to get through workday, from job counselor. Also my ISSP worker took care of all I needed as far as dealing with Social Security while working.

One Participant's View: *Most Helpful Services*

Over the years, Billy said that the most helpful services have been:

- *Job coaching. – Job coaching has been very helpful to Billy. When he starts a new job, Billy indicated that the coach would be there all day. Then, one time per week, fading to one time per month. People come by to check on work (hygiene, job requirements, etc.). They teach job skills, and make sure Billy is prepared to work. This service has been individualized, even when two or more people are working in close proximity.*
- *Resume. – Joe has helped Billy to construct a good resume.*
- *Job interviewing class. – Billy took a One-Stop Career Center generic interviewing class that focused on being on time, and participating in interviews. There was video feedback. The class was “very helpful.”*
- *Job search and job finding. – Billy has used the job search services of the One-Stop Career Center. He gets help finding work. Someone will call Billy to alert him to a job possibility when he is out-of-work.*

- He liked the help regarding finding a new job, he found that useful.

Success Stories and Survey Results

- Therapy of working, don't think of the past or thinking not worthy. By sharing my ability and have financial incentives.
- I enjoy how the ISSP staff assists their recipients with ideas seeking employment without the patient fearing they may lose their Social Security benefits. The ISSP is a great back-up plan for Social Security patients to improve their social-economic status.

Other services, resources

- Pali was really helpful in accessing services and providing classes that gave us tools and skills to manage time and finances more effectively as well as opportunities to network with other clients. It helped that she was available for the duration of the project and she was able to meet us at North County or school (someplace more convenient to get to).
- I really like the fact that we were given a book to help us in the future to better ourselves for our employers. This information has helped me relate with my co-workers, friends, and family.

Helpful staff, support (n.e.c.)

- I really liked the support I've received and am seeing at the present. They were there for me when I was very hysterical and could not make my mind up what to do for myself. Joe H. and Nancie B. have had very great patience and understanding plus help me find great jobs and point out my strength and weakness. I love this program and hope it will continue.
- Angelina is a neat person, the whole staff is great. They're very professional, very personable, they really make you feel welcome. Overall, it was a great program.
- Every single person that came into her life from the program seemed like she knew them all along. Someone she could talk to, a counselor, an interviewer, always helped. So much support. Everyone in the program has given 100% there. When she doubted herself, they would remind her of everything she has already accomplished.
- Pali Basi is a gem. She and everyone down there at VRS were helpful and kind. The employees were the number one benefit of ISSP. The money was important too.
- Carol Bowman is great.
- I like how they help people.

Success Stories and Survey Results

- Very thoughtful and very encouraging and always there. It was very helpful for them to come out to the house.
- *Personnel:* Joe Hennen is extraordinary, he was especially the reason she wanted to be in the project. Her problems are anxiety and depression, so when she gets overwhelmed, talking to Joe helps her feel better and be in a position to make her feel that she can solve the problem. He stays nice and calm. *Services:* She had already been working for VRS for four years prior to this, so the services that were most beneficial to her, were the support services, was already fairly advanced in her return to work, in career.
- She liked Carol and Valerie. The system worked well for her.
- Staff has good intentions.
- Counselors with good humor, pleasant, follow up (for the most part these San Mateo folks are truly exceptional).
- They helped a lot, you can be honest and talk about different things and they helped him without the belief that he'd go back in. It helped him become more of a working person and be somewhat understood.
- He loved the staff. They always returned his calls, took care of paperwork that he might not have been able to do himself. They were supportive, they listened, and even stopped by his work to pick-up papers and help him out.
- The emotional support of Carol Bowman and Angelina Quintana
- The support.
- Greg Wild of the ISSP project.
- She liked her two counselors, Greg Wild and Pali Basi. She could talk about everything with them, including the possibility of getting a better job. Pali was very supportive and at the same time helped her to be careful and wise not to do too much, and stress herself out.
- Liked Joe Hennen. He counseled him through his mother's death.
- Liked the personal contact with the staff members, more support as needed when people in the program initiate it. They were very supportive. Joe Hennen and Nancie Broman gave her continuous support.
- She liked her rehab counselor, she was very good. She liked her mental health counselor, Barbara Jackson.

Success Stories and Survey Results

- Proactive, professional, humane.
- She enjoyed the services and personnel (she would not elaborate).
- She liked the personnel.
- He liked the positive attitude of everybody and the opportunity to participate. Enjoyed state rehab's help and Joe Hennen at VRS.
- I have a very good counselor.
- She liked Angelina and Carol, they really helped.
- Just knowing you have the extra support.
- They were always ready to help any way that they could.
- I really liked the ISSP support.
- They are always there to help you with any problem you have, whether it's personal, with SSI, or with PG&E or about job related issues
- Angelina was very understanding, she was very supportive.
- Everyone was always helpful and very caring as to my situation and needs. I want to just say thank you from me to all of the professionals I've met.
- Being involved in the ISSP program has given me a much appreciated comfort zone. It has enabled me to continue to have faith in the system and incentive to continue on my road to recovery.
- My counselor is an exceptional person with extraordinary patience in working with me! Highly professional! He's helped me with keeping benefits, doing extra paperwork, budgets, resources, ideas, you name it, he's done it. If it has to do with me, keep it afloat. He's the best counselor around.
- They desire to help and provide support for my care and welfare.
- I got excellent support when I needed it.
- A positive attitude -- to learn from someone that just because she was diagnosed with a mental disability, it didn't mean she couldn't work or be involved with her community. Her life wasn't over. She learned this from the staff. This program invited great opportunities.

Success Stories and Survey Results

- Greg Wild has been supportive and helpful through this process.
- The ISSP staff that I worked with always made me feel respected even when I screwed up. They were able to put me at ease.
- The excellent staff, the support, the waivers, the excellent program evaluations.
- She liked both the staff and services.
- I liked the friendly services that I received, and the special efforts that the staff gave me to succeed in my life.
- The door is always open. They're there when you need them.
- She liked the staff. Whenever she had a question they were always available.
- A perfect service.
- 1) Liked the staff. Always looking out for me and encouraged taking care of my illness and myself first priority. 2) Changed my attitude and outlook on my future. Self-esteem and personal appearance improved. I know that there is hope. When I am physically able, I can do it. 3) I want to get a degree in Social Services and get a job helping my community.
- I appreciate any help group, for I am in need of this type of service.

Things did not like or which could have been better. -- Q7b asked: "Is there anything about the ISSP project (services, personnel) that *you did not like* or which *could have been better*? IF SO, PLEASE DESCRIBE. Here are the things said:

SSI waivers, income, assets

- Put aside some of the 1 for 4 dollar SSI payment check (1/2) for allotment (voluntary) on a 6-month payment schedule to save more and get additional time to think about use of extra money.
- Trying to live on SSI and maintain an apartment, will be harder with the economy the way it is.
- She says they (the people in the project) need more help keeping their income, the Social Security waivers should last longer.

Success Stories and Survey Results

- He had to inquire himself if the program was ending. He had to find out about that himself, but feels that would have been good to let him know of the ending date ahead of time, he could of saved some money up before it ended.
- I do not like that if I save a lot of money as the ISSP project allows, and the ISSP project then ends, the money I've saved may be enough to disqualify me from SSI, even if it is not enough to live on. That's why I have not taken advantage of this possibility. There is a big difference between the amount of money that disqualifies (\$2,000) and the amount that a disabled person needs to go to college, buy a home, get the health care needed to get better, or survive without disability checks (in the long term).

Social Security Administration, other benefit programs

- 1) This isn't SSA's fault, but something should have been done to address the SSDI SGA cliff. 2) Make the *Easy Back-Off* easier.

Easy Back-Off: *Half Tongue in Cheek*

In late 1997, I went on SSI/Medi-Cal. Near the end of 2001, my earnings were such that SSA stopped sending me a check. I discontinued Medi-Cal at the same time. Then, in Spring 2003, I received a letter from SSA stating that they had set up an appointment for me to come in for a financial eligibility review. I didn't go to the appointment, figuring they would follow through with their threat to close my case. Instead, they sent another letter scheduling another appointment. So, I called the person indicated on the letter and left a message asking them to close my case because I didn't meet any of the qualifications: I wasn't disabled, I was earning too much, and I was over the resource limit -- all reasonable excuses to close my case. A month or so later, I received a letter from Medi-Cal urging me to come in for a financial review, so I could stay on Medi-Cal. I called them and told them I wasn't qualified for Medi-Cal. In December 2003, I got another letter from SSA. They decided to take the Monte Hall approach and sweeten the deal. They told me I was now eligible for SSDI. I called again, and told them I was not qualified. (It was starting to feel like it was harder to be unqualified for something than it was to qualify for anything.) The person I spoke with said my SSDI would be retroactive, and I might get some money. However, it occurred to me that getting SSDI retroactively might mean adjustments to SSI, and possibly all I might end up with is an overpayment. So, I passed. In May 2004, I received one more letter from Medi-Cal wanting to perform an eligibility review. I talked to the worker and finally convinced him that I didn't qualify. In June, I got a notice from Medi-Cal closing my case.

-- ISSP Participant

Success Stories and Survey Results

- Working with people in the PASS project are bureaucratic, they're not sympathetic to people with disabilities, they create arbitrary rules and make it hard to reach goals, they're hard to work with.
- All of the income [check stubs] were not turned in immediately, therefore, when she was no longer working or having any income, that's when the deductions were taken out of her checks. That left her losing housing and homeless.
- I needed more help with Social Security and Medicare notices. Working with Dr. was very confusing.
- I need help maintaining public benefits and I have so many aspirations in my mind, but if someone doesn't help me, how can I survive? I need help because they want to stop my Social Security. I believe that you're going to help me promptly.

Work, job, employment, training

- They waste my time to wait for other new job and I have been waiting for about 6 months. I will have to transfer to other vocational rehab counselor and she is deaf and I am deaf too. She will help me find a job.
- I would just like for the program to do better job to assist me more on getting a better job. Not to just send me on by myself to try to get a job.
- I should not have went to work full time. I should have listened about staying part time.
- The program did not follow through with providing services. I sought employment help and none was offered. Not even one referral or interview.
- Less problems trying to work at home. It shouldn't be so hard to accomplish. Mental Health should be merged with OTES and working with it, not outside of it.
- I still haven't gotten a job after a long time looking. I had hoped for a little more help though I've recently gotten some good suggestions.
- 1) I was not physically or mentally able to do my best while I was employed. Because of this reason, I lost my job. It became too much to handle and not much support from fellow employees or supervision. 2) I was expected to do better, and so, disappointed my family. Now they think I can't handle anything.

Success Stories and Survey Results

- The slow up on a career or other goals.
- She wished she could have received more job counseling.
- The type of jobs offered and therapy.
- When I expressed my need for vocational training to be able to fully support myself, I was denied at first by ISSP. It wasn't until I talked to an advocate in another program that ISSP told me I could be trained for something. I was very upset over this particular situation.
- Ending it makes people not want to work. Why even try if it's ending? Everyone is giving up, it's too hard of work, too much of a hassle.
- I never really understood the intent of the ISSP program. I already had a psychiatrist and a counselor. I thought they were to help me with job search.
- My job is OK but it is very boring at workshop. I have been patient until I get a better job.

Other services, resources

- When I was a single-parent mom, I needed Section 8 housing by the community college and didn't get it. I was at the mercy of Gleaners and Girl Scouts.
- Voc Rehab was not very helpful. I needed more hand holding in order to progress to maybe a different career path. I hated the periodic phone calls for which I wasn't getting any real help.
- One-on-one counseling could be longer than 6 visits if needed.
- People with mental disabilities sometimes need special attention. Case workers need to remember sometimes we have issues 'normal' workers don't have and need to be treated accordingly.
- I do not like when I ask my case manager if I could take money out, but she will not let me.

End of the project

- She wishes it could have continued longer, because she feels that it's ending and she's hasn't completely gotten everything she could get out of it. She needs more time to transition from the program, and that's not going to happen.

Success Stories and Survey Results

- Just wish it would continue and be implemented elsewhere.
- It should last longer. He's going to miss it.
- It should last longer. It benefits a lot of people; it helps a lot.
- I worry about the ISSP ending because who will I be available to turn to in regards to benefits issues, problems at work, losing job, money issues, housing concerns? I would feel lost and panicked without the necessary supports. How would I survive?
- Wished it would have lasted longer. The program makes sense. It should be something that should be in place permanently. Social Security would end up benefiting from something like this when set up permanently.
- I think more aggressive outreach or better yet, a mass mailing on the ongoing programs.
- Some of them felt in the program and were not sure, once this ends, where's our support? When it comes to the end, what do we do if something comes up and we had that support in the past. Now, who do we go to? Some of the people in this program already had counselors, but this was her question because she was new to the program. That lingering question. People could have been reminding her that she's not going to be completely cut off.
- She would have liked it to last longer.
- I don't like that ISSP is ending so very quickly. I don't know who will help me now.

Helpful staff, support (n.e.c.)

- It would have been helpful if there weren't as many ISSP team changes.
- She would have liked to meet with her rehab counselor more frequently.
- I was not even told of any services, other than the efforts of Greg Wild.
- Support from counselor needs improvement. You're pretty much on your own.

Other, miscellaneous

- Equalize one sense of life style. Do not feel your 'helping others helps my self.' Real selflessness is [undecipherable].

Success Stories and Survey Results

- More communication, more letters with different types of responses, more answers that he might be able to choose from in the letters, he needs more answers to choose from on the survey. Different types of considerations in the survey should be added.
- He feels he needed more printed material, for any new projects, he likes to show his sisters the fine print and the layout of projects he's involved with.
- Help doing resume & paperwork, elimination of segmentation problems, job more closely suited for, help with my housing (sick building syndrome - mycotoxins, environmental) that caused me to decompensate, counseling for emotional abuse, transportation help with my car.
- There could have been more involvement with people (would not elaborate).
- The reports, every 3 months, yet actually they weren't hard to do (refers to VCU data collection forms).
- He doesn't like paperwork.
- More information on the benefits of the program and how to put them in place.
- It didn't work for her in her particular situation, but she feels it would for others of another situation.
- I wish I could see my kids every week.
- My health could have been better.

Balance: things liked and things that could have been better

Table 3 summarizes the information above, by showing how many respondents to the mail/telephone survey mentioned things falling into the categories named above, when responding to Q7a and Q7b.

Here are four generalizations regarding the *balance* of responses to Q7a and Q7b:

1. Many more respondents mentioned something they *especially liked* compared with the number who said there was something they *didn't like* or that *could have been better*.

Success Stories and Survey Results

Table 3. Balance (or, Pattern) of Responses, by Category: Respondents to Q7a and Q7b in the Mail/Telephone Survey

Theme or category	<i>Especially liked</i>		<i>Could have been better</i>	
	Number	Percent	Number	Percent
SSI waivers, income, assets	6	8%	5	9%
Social Security Administration, other benefit programs.....	12	15	5	9
Work, job, employment, training	12	15	14	26
Other services, resources	2	3	5	9
End of project	0	0	10	19
Helpful staff, support (n.e.c.)	47	59	4	7
Other, miscellaneous	0	0	11	20
Total (Avg.)	79	100%	54	100%

2. Nearly three-fifths of the positive remarks had to do with helpful or supportive staff, in general.
3. The most common remarks about things that *could have been better* was in the work, job, employment, training category.
4. Regarding things *not liked*, the end of the project was a rather common category, with nearly one-fifth of the remarks falling under that theme.

Personal interviews

In the personal interviews, responses were more free flowing. Q2 asked, in part, “After enrolling, what services did you seek out and use?” and Q3 asked, in part, “What ISSP and/or other services were most helpful to you?” Consistent with the picture in Table 2, above, dealing with Social Security (e.g., overpayments, wage reporting, problem-solving) was mentioned most often as helpful. A broad range of other services and supports was noted. This included mental health services, help finding or keeping a job, preparing resumes, learning interviewing skills, having someone to talk to, and the like.

Work, Earnings, and Benefits

The 27 stories of successful participants show how the \$3 for \$4 SSI waiver influenced income, and the changes in income associated with the end of the \$3 for \$4 waiver, effective September 30, 2004. With one exception where we were unable to determine the SSDI award, Table 4, on the next page, shows the earnings in July 2004, along with SSA cash benefits that month, and how earnings and SSA cash benefits will change in each case when the \$1 for \$2 comes back into place.

The biggest absolute change (\$336.50 per month) will occur for Wayne, who is an SSI Only recipient who earned \$1,899 in July 2004. The smallest absolute and percentage change will be Anthony (\$18.50; -0.6%), who earned \$3,171 in July 2004. The largest percentage change in income (-17.7% in both cases) will be for Participants A and E, both with earnings near the cash cut-off point under the \$1 for \$2 rule. (We assumed SSI/SSP of \$790 a month, the independent living rate for most SSI recipients in California.)

Onset and Work History

In the personal interviews, we asked people (Q4) “In general terms, please describe your *work history* before and after experiencing your first acute episode.” What people had to say was rather unique, as one would expect. Many were first diagnosed as having a mental illness as adolescents or young adults. Some experienced (or, realized that they had) a psychiatric disability only later on.

We wanted to see whether *successful* project participants had rich work histories. Some did, but some did not. Those with higher current earnings typically had more work accomplishments than those who earned less. Allen, for example, whose story is on pages 93 to 95, was a successful businessman (CPA) until major depression

Table 4. Monthly income implications of the end of the \$3 for \$4 SSI earned income waiver, based on July 2004 earnings and SSDI: 27 interviewed individuals

Individual	Earnings	SSDI	SSI under the \$3 for \$4 waiver ^a	Earnings, plus SSA cash benefits	Earnings & SSA benefits when \$1 for \$2 returns	Difference	
						in monthly income (dollars)	as a percentage
Nineteen w/stories:							
Pam	\$3,548	--	\$0.00	\$3,548.00	\$3,548.00	\$0.00	0.0%
Don J.	412	--	708.25	1,120.25	1,038.50	-81.75	-7.3
Wayne ^c	1,899	--	336.50	2,235.50	1,899.00	-336.50	-15.1
Marci	893	--	588.00	1,481.00	1,279.00	-202.00	-13.6
Richard ^d	1,290	\$752	--	2,042.00	2,042.00	0.00	0.0
Gabriella ^c	1,279	319	187.50	1,785.50	1,598.00	-187.50	-10.5
Don W.	478	--	691.75	1,169.75	1,071.50	-98.25	-8.4
Kevin	566	--	669.75	1,235.75	1,115.50	-120.25	-9.7
Tom	1,027	--	554.50	1,581.50	1,346.00	-235.50	-14.9
Helen	659	714	--	1,373.00	1,373.00	0.00	0.0
Anthony ^c	3,171	--	18.50	3,189.50	3,171.00	-18.50	-0.6
April	759	765	--	1,524.00	1,524.00	0.00	0.0
Cheryl	305	162	588.00	1,055.00	995.00	-60.00	-5.7
Ken ^c	2,122	--	280.75	2,402.75	2,122.00	-280.75	-11.7
James ^c	1,983	--	315.50	2,298.50	1,983.00	-315.50	-13.7
Billy	500	900	--	1,400.00	1,400.00	0.00	0.0
Derek ^c	2,061	--	296.00	2,357.00	2,061.00	-296.00	-12.6
Diane	133	663	--	796.00	796.00	0.00	0.0
Allen	4,250	--	--	4,250.00	4,250.00	0.00	0.0
Seven w/o stories:^b							
A	\$1,408	--	\$459.25	\$1,867.25	\$1,536.50	-\$330.75	-17.7%
B	1,261	--	496.00	1,757.00	1,463.00	-294.00	-16.7
C	506	--	684.75	1,190.75	1,085.50	-105.25	-8.8
D	451	--	698.50	1,149.50	1,058.00	-91.50	-8.0
E	1,398	--	461.75	1,859.75	1,531.50	-328.25	-17.7
F	1,147	--	524.50	1,671.50	1,406.00	-265.50	-15.9
G	355	--	722.50	1,077.50	1,010.00	-67.50	-6.3

^aFull SSI assumed to be \$790 per month.

^bCould not report on one person because he/she received SSDI of unknown amount.

^cNo SSI, if \$1 for \$2.

^dUses *Subsidy* work incentive.

took hold in middle age. He has been quite successful in the ISSP project, and has left the SSI roles. He has a full-time job with full benefits. At the other extreme is a young man, whose story is not one included in Appendix B, who lived in locked facilities for some fifteen years, and went from there to The Work Center (sheltered workshop), and now has a very part-time job in the community at a garden center, earning about \$300 per month.

Work Ethic, Growing Up

Members of the Statewide Coordinating Committee for the ISSP project were interested in knowing whether messages received during the teenage years, about the value of work and schooling, might differentiate those who were quite successful from those less so. So, our interviews included Q5, “Who did you live with as a teenager? Did adults in your life work outside the home? What value (both verbally and by their own behavior) did adults in your life put on working for pay or profit? Did any of this make a difference in your success?” Clearly, because we do not have comparable information on those who were less successful, no causal inferences are warranted.

Nevertheless, what we learned from our interviews is sufficiently intriguing that we recommend additional research on the basic question, with discussion of possible practice implications. Even if research showed a strong correlation between work ethic at an early age and subsequent economic success, we would not favor recruitment and selection into specialized employment services based on that fact. Rather, the finding is likely to illuminate differences in approach (e.g., pacing, counseling, etc.) that might be more fruitful, knowing about messages regarding work and school received by individuals during their adolescence.

Near the end of the questionnaire survey, we asked (Q8): “When you were a young teenager, with whom did you live?” We asked this because of an interest in whether one or more adults in the home worked outside the home, and what messages may

Success Stories and Survey Results

have been conveyed regarding the importance of work. Nearly two thirds (67/103) of respondents said they lived in a family with two parents. Another 19% (20/103) lived in a single-parent household. 7% lived in a family of other relatives (e.g., grandparents, aunts and uncles). Only 1% (1/103) checked “foster family” or “children’s group home.”

A Highly Unusual Early Work History

Sarah’s mother went to jail when Sarah was 3 years old. Both mother and father were Hell’s Angels. From the age of 3 to 18 and one-half, Sarah lived in a series of foster care placements. Sarah’s first foster mother engaged in insurance scams involving allegedly stolen vehicles. Another foster mother was also a white-collar criminal. A third was a Bunko artist. Finally, one foster family (mother and father), who lived in the projects in San Francisco, moved to San Mateo. They were able to buy a home. The foster father was an ambulance driver, and Sarah learned that “better dads” work for a living.

Q9 then asked: “Did the adults with whom you lived as a teenager work outside the home?” The vast majority (91%, 93/102) checked “Yes, one or more worked outside the home.” Only 4% (4/102) said “No, no adult worked outside the home.” The rest said “Not sure (e.g., Don’t Remember).”

What Accounts for Success; Advice to Others

Interviewees were asked, Q6, “Knowing your own experience, and perhaps the experiences of others struggling with mental illness, what *factors* may have made a difference in your degree of employment success?” Here are the themes evident in how successful participants answered this question, roughly in the order of how many individuals mentioned something in the category named:

1. *Positive behavior and attitudes.* – Nearly all interviewees mentioned something about maintaining positive attitudes or behaving in certain

Some Wise Advice

Ken made several points:

- *Knowing what work means in terms of values. – Whether full- or part-time, work can affect how others see you, can bring extra dollars to spend, and can affect comfort level.*
- *One needs to know oneself, and what one wants from work. – Everyone is different. If a person works more, there will be fewer hours to relax and do other things. Or, a person may get fatigued and see problems amplified. Hours are the key.*
- *Employers get a bonus when they hire someone with a disability. – It makes sense to start part-time, and then increase hours if one remains comfortable.*
- *When not working, a person should find things to balance one's life. – Do things that one enjoys. Try new things. Ken spends time bicycling, using his computer, watching television, going to free concerts, and reading newspapers and magazines.*
- *Ken has also learned the importance of being friendly and “bending a little bit.” Doing these things will increase cooperation. One needs to be respectful of others. Learning these social skills helped Ken at the bike shop. When verbal battles escalate, one can get into physical fights. Communication first; fighting last is something Ken tries to live by.*

ways. This category includes remarks such as be assertive, be confident, stay sober, be honest, plan ahead, set goals and strive for them, and the like.

2. *Deal successfully with mental illness* – Well over half the interviewees said something about dealing successfully with their mental illness, or recognizing that their illness may not have been as severe as that of

others.¹ Therapy, getting the right medications, acceptance, focusing on recovery (e.g., “Recovery is key. I wanted to get well and I’m willing to work on it”); staying away from drugs and alcohol, being proud and standing tall, not continuing in denial, learning from others, and other remarks illustrate this point.

3. *Persistence, tenacity, drive.* – A comparable number of interviewees had something to say about persistence or drive. Here are examples: “I say, ‘Get off your ass and get a job’;” “Keep moving forward, keep trying;” “Don’t give up;” “Try, try, and try again;” “In the words of Winston Churchill, ‘never, never give up’.” Three noted their strong desire to work. Two said that work gave them a reason to get up each morning.
4. *Use available services and supports.* – Approximately ten interviewees mentioned making use of services and supports. Here are two examples: “Take advantage of programs offered. Use their support;” and “Use the supports that are available to you – people, volunteer opportunities, and schools.”
5. *Faith, spirituality, philosophy.* – Between five and ten interviewees mentioned something in this category. Here are examples: “Do something with your life;” “God gave me a big mouth for a reason,” said by a person who aspires to be a mental health advocate; “Keep your faith in God; he will never let you down”

¹ Here’s an example. Richard feels that his mental illness is not as severe as others. “There but by the Grace of God, go I.” Mental illness overwhelms some people. Some get better and then slide back. Richard slides back, but the pause (or, relapse) is shorter than it is for others. Richard feels fortunate. Here is another participant’s response: Billy attributes his success to how he has handled his mental illness. He said that “knowing how I am seen” has been important. He tries to be very social with employers, and orderly, and punctual. He focuses on learning the employer’s expectations. He has seen some people who have been unaware of their mental illness. When they lost a job, they were unaware why. Some are so sick that they are unaware of most everything.

More Good Advice

A significant aspect of Tom's success has been the lessons he's learned from eastern philosophy – the practice of being in the here and now. He tries to be attentive to the smallest things (scents in the air, the color of the sky) and not take anything for granted.

He also believes in having a positive, “can do” attitude. A quote from his Mental Health Consumer of the Year biographical sketch sums this up: “...each morning he reflects on the positive things in his life and then walks out the door with an attitude that he can make the most of the day ahead of him... As he walks along his path of wellness and recovery, he carries the thought that nothing's going to happen unless you do it. Tom is making his life happen, one day at a time.”

Tom also had advice for others:

- *You can overcome; you can survive. It'll take a lot of work, and ultimately you are going to have to do it yourself.*
- *Build good social skills.*
- *Be assertive in your treatment; be an informed consumer. For example, ask about the side effects of medications.*
- *Ask about new medications.*
- *Read a lot.*
- *Use the supports that are available to you – people, volunteer opportunities, and schools.*
- *Read about, and talk with, people who have recovered.*
- *It is important to use all the help or services available, and take an active role in your recovery.*

Over the years Tom has played an active role in the self-help movement in the county where he lives, including serving on the board of an organized mental health client group.

Policy and Practice Implications

We turn now to the implications for policy and practice of what participants (and ISSP support staff) have communicated to us. First, we summarize what participants have said about what has made a positive difference in their own lives. We then turn to lessons (or, good practices) for specialized employment services to consider. Finally,

we look at policy implications for the Social Security Administration, given that agency's interest in helping working-age adults with disabilities return to work and become more self-sufficient.

Individuals and Advocates

Participants have emphasized three things: (1) managing their mental illness well; (2) developing and maintaining motivation, drive, and associated attitudes and behavior; and (3) finding (and using) services and supports to accomplish their goals.

1. Managing mental illness well. – Managing one's mental illness means a number of things, including but not limited to taking medications, doing things to manage symptoms and recover, and having people to talk to. Here are some illustrations of what successful participants had to say about this subject:

- “Recover is the key,” Bill said. “I wanted to get well and I'm willing to work on it.” In term of advice for others, Bill said, “Stay healthy” and “once earning money, use the money wisely (don't blow it).” Counseling helped, he added. When Bill was working long hours, he became totally depressed and couldn't sleep. There needs to be a basic course on recovery, intensive and ongoing (or repeatable).
- Marci earned about \$3,500 a month for a while. Her siblings and parents helped with childcare. At age 27, she was not very consistent taking her medications. Without health coverage, she started taking half-doses, and ended up 6 days in the hospital. The lesson: taking medications faithfully is very important!
- Kevin's counselor started him in the sheltered workshop in September 1976. She referred him to the sheltered workshop several times, and each time he ended up leaving, due to his apparent paranoia and delusional thoughts. His counselor then put that idea on hold for a while. After a few years, Kevin called again, requesting to work at the sheltered workshop. When his counselor asked what was different about him this time, he replied “CLOZARIL.” His counselor got him into the sheltered workshop and he was like a “changed man.” He could focus and proved

quite productive. This led to a referral to the janitorial program where his performance resulted in his supervisor calling him “the best janitor he had ever had.” From this point on Kevin took an active interest in staying employed.

2. Motivation, drive, and associated attitudes and behavior. – As explained earlier, perseverance or tenacity came through in the remarks of participants when asked to talk about factors underlying their success. And, the number of individuals who mentioned adopting certain attitudes (e.g., “can do”) and maintaining certain behaviors (e.g., staying away from alcohol or drugs) was substantial. Here are illustrative comments:

- Bill said: “I wanted it.” “I’m motivated.” Two years earlier, Bill had said that he wanted a 40-hour per week job, with benefits, and to get off of SSI. Bill began receiving SSI in June 1994, when he was 19 years old. As soon as he got on SSI, he knew that he eventually wanted to get off, as he didn’t want to be a burden to his family, or himself. “I didn’t want to become a statistic,” he said at that time.
- Gabriella believes it’s important to work. Anyone who collects SSI and doesn’t work “is just lazy!” I say “get off your ass and get a job.”

3. Using available services and supports to accomplish one’s goals. –

Many participants also mentioned “going to one’s support people” when problems arise, and using available resources to accomplish one’s goals. Here are two examples:

- Don says that one of the most important services he got was learning interview skills. He learned how to look an interviewer in the eye, the importance of good posture, to listen to the questions carefully before answering, and making sure he doesn’t talk too fast. Being calm in an interview was also an important lesson. He said all this helped him build self-confidence, and shortly after taking the interview skills class, he got his first job. This was after years of unsuccessfully trying to find work on his own.
- When something occurs, and Pam has trouble dealing with it, she goes to her support people for help. For her, it is important to get feedback to deal

with anxiety. For example, a student came into her class and left his headphones on. She discussed this with her support people, who helped her understand her feelings and examine options. Based on what she learned, she told the student that he/she could go outside to listen, but couldn't use the headphones when in class.

Specialized Employment Services

Success stories and other remarks by participants in the ISSP project, along with reflections of project staff, paint a picture of elements contributing to effective services for individuals with psychiatric disabilities. These elements include (1) having available services and supports that help with return to work; (2) individualization of services; (3) being accessible and wisely responsive to individuals receiving employment services; (4) developing “systems” to assist participants be as independent as possible; and (5) working effectively with others.

1. Having services and supports that help with return to work. –

Fortunately, the ISSP project was embedded in DMH/DOR Cooperative projects that involve collaboration between DOR counselors and DMH employment specialists. Yet, in part because signing up for DOR services was not a requirement and certain DOR-funded services can be provided only to those with a DOR connection, ISSP staff at one site had to broaden their portfolio from (1) benefits planning and assistance and (2) employment support (the central work of Service Coordinators) to include for those without a DOR connection (3) vocational counseling, planning, skill-building (e.g., resumes, interviewing), job development and job coaching. This *need*, incidentally, probably led project staff to work more with One-Stop Career Centers, with the SC often serving as a One-Stop Navigator.

2. Individualizing services. – A rich staff/participant ratio (25:1), along with flexibility in use of project-funded resources and SSI waiver opportunities, led to substantial (and fruitful) personalization of services. Each person comes to

specialized employment services with a unique history (e.g., work, illness), set of circumstances, and aspirations. It is true that each person, as an SSA beneficiary, had a few things in common, but beyond that the dominant theme was uniqueness. One site had a well-established tradition of using a sheltered workshop, along with an extensive array of *temp*, *trainee* positions, to assist individuals in moving toward integrated, potentially self-sufficient work at a variable pace, accommodating differences in drive and other factors.

Here are some examples of individual differences that called for somewhat different responses or interventions from project staff:

- Vacations are very important to James. Vacations serve as a motivator. When he got a \$3,500 back payment, he started an Independence Account. He used this money for a vacation in New York. Since that time, he has saved about \$3,000 each time for vacations at Lake Tahoe, Hawaii, Florida, and Las Vegas.
- At times, Louise felt she was getting too much help; “it was like having a drill sergeant.” But looking back she feels it was necessary: “If they hadn’t pushed me, I don’t know what would have happened. They gave me tough love.”
- When Marci signed up for the ISSP project, she signed up with the Department of Rehabilitation (DOR) as well. “It took about one year to get off my tail,” Marci said. About two years ago (Fall 2002), she started back to work, and her DOR counselor quickly closed the case after three months. “I cannot figure three months is enough for success,” Marci said. The DOR counselor was so pessimistic about Marci working that she got busy “to show him.” Marci looked for about two years for a job. She was often among the top three or four being interviewed (out of 200 applicants), but her lack of recent work experience stood in the way.

3. *Being accessible and wisely responsive to service users.* – Three very experienced participants in the ISSP project, independently, observed that it is essentially impossible to predict, in advance, who will be successful and who will not be. Hence, all three urged an “open door” policy for entry into specialized employment services. But, as staff become more acquainted with the individual, two positions seemed to make sense: (1) spending more time and effort assisting individuals who demonstrate, by their behavior, a clear commitment to

return to work, and (2) being open to each person having their own clock as to “readiness” to proceed to regular, integrated employment. This second point meant not spending a lot of time with a person “not ready,” but welcoming that person back for intensive services on the individual’s schedule. Here are a few examples:

- One successful participant noted: “As I saw what the program might do for me, I got more involved. The more involved I got, the more involved staff got.”
- The \$3 for \$4 didn’t seem like a selling point for Kevin, since he is not a big spender, according to the SC. It seems that it was the opportunity to have a job that motivated Kevin. The extra income was nice, but not necessary.
- Louise wasn’t working, and in fact hadn’t worked for six years. She liked the idea of getting help finding a job: “I couldn’t do it myself; they’re very positive and encouraging here. Right away this was the right place to be. It wasn’t overwhelming; they allowed me to take little steps. And their timing is good. I needed tough love, but they didn’t give it to me right away.”

4. Developing “systems” for those returning to work to assist them in becoming more self-reliant (e.g., wage reporting; dealing with SSA notices).

– Intensive financial advisement services, for the poor, are unlikely to be sustained. Thus, it is important to assist individuals with disabilities, and those around them, to know what to do and how to do it. Major pieces involve (1) timely wage reporting (especially for SSI recipients); (2) abiding by a sensible budget on an accrual basis, because of the near inevitability of overpayments; (3) knowing and keeping track of one’s status as an SSDI recipient with respect to Trial Work Period; and (4) knowing what to do with frequent notices from the Social Security Administration.

- Sarah said: “ISSP staff are like H&R Block. They help when the letters come, that feel like an IRS audit.” Sarah said she feels safe, because ISSP staff is there for you. SSA can also be condescending. ISSP staff means someone is on our side. “Going to work and dealing with SSA is

anxiety-provoking.” Sarah feels the letters from SSA are *unconcerning* (her word) and unsympathetic.

- With the ISSP project, George has gotten into the practice of regularly reporting his wages and taking a more active role in managing his benefits.
- ISSP staff helped Anthony get the \$3 for \$4 waiver. They also helped him with wage reporting, overpayments (“a lot of times!”) and record keeping. The staff provided a lot of encouragement, urging him to continue with school and to balance work/life issues. The “can do” attitude they imparted really helped, Anthony said.

5. Working effectively with others. – Sometimes, very complicated barriers to employment surface after a person returns to work. If not addressed, the person is likely to fail. Around benefit issues and employment, ISSP staff learned quickly the importance of working collaboratively with representative payees, residential service providers, public housing authorities, and the Social Security Administration, among others. Rep payees for SSI recipients who were accustomed to doling out “an allowance” had to be aware of the implications of the \$3 for \$4 waiver for its effects to be felt by the participant and to avoid going over the countable resource limit. When an individual’s earnings reduced a person’s SSI below the amount to which a residential service provider is entitled, some “confusion and disgruntlement” would be minimized by a careful explanation of each party’s responsibilities.

- One person’s earnings were before the SSI waivers, and before on-going project communication with Social Security offices. A lot of confusion arose over overpayment amounts, and the entering of earnings information into the SSI system. Gabriella had a representative payee at this time, and staff learned very quickly the problems that were caused when the payee was not kept in the loop. Gabriella owns her own home and has a mortgage payment. Historically, the payee paid the mortgage. With lower SSI because of earnings, the payee was running short of money and Gabriella wasn’t saving any of her earnings to make up the difference. There were a couple of real tight months. Negotiations with the mortgage company ensued. Throughout this entire time, problems with the mortgage company continued – late penalties added without reason, a change in mortgage companies -- and this added it’s own flavor. The

payment system was changed, and when Gabriella wasn't able to keep up with the change she was harassed by an individual who threatened her with the loss of her house.

- Before going to work through the ISSP project, Reality needed help getting a driver's license. Angelina went with him ("held his hand," so to speak) to DMV. The license had been revoked (or suspended) because of failure to pay child support totaling \$24,000, and because a traffic ticket from back in 1997 had not been paid. Because his daughter had been living with him for a while, he didn't feel that he needed to pay child support. Having a license was key to successful employment, because he could then drive to work. Angelina went "above and beyond" the line of duty. She said "I'm going to help you get your license back." Ultimately, a judge dropped both charges (traffic ticket and child support). With Reality "being scared," it was helped immensely to have staff support.

Social Security Administration

The ISSP project offers many possible lessons for the Social Security Administration, as it looks ahead to improve return-to-work strategies and services. First, we comment on the SSDI *cliff* issue, where we have already recommended in our *Revised Interim Report* that (1) the TWP and EPE be eliminated; and (2) a beneficiary's earnings above a variable level (predicated on past earnings) be "taxed" (i.e., reduced) much like retirement benefits for those between 62 and 65 years of age. Second, we look at what individuals have to say about the \$3 for \$4 additional earned income exclusion, and recommend tracking those whose cash benefit has ended with return to the \$1 for \$2 standard. Third, we review thoughts about IDAs, IAs, and the \$2,000 (\$3,000 for a couple) countable resource limit. Finally, we make a case for using wealth acquisition and \$3 for \$4 waivers more selectively and strategically, to test their impact on employment, earnings, and use of SSA benefits.

1. **The SSDI cliff issue.** – As noted in Table 4, on page 26, each SSDI Only beneficiary we interviewed, with one exception who used a *Subsidy* work incentive, stayed under SGA. (There were SSDI beneficiaries who took a chance and went off of cash benefits, as we noted in our *Revised Interim Report*,

but their stories are not told here.) Here are the observations of an ISSP project staff member about a participant receiving SSDI:

- In July 2004, Helen earned \$659. This is her monthly salary. She is paid \$8.24 per hour, and works about 20 hours per week (10 hours at each job). Her monthly income is about \$1,373, made up of \$659 in earnings and \$714 in SSDI. ISSP staff feels that Helen would probably work more if she did not have to deal with the SSDI “cliff,” by going over Substantial Gainful Activity (SGA) level. She does not feel at this time that she can work full-time and go off SSDI.

2. The \$3 for \$4 additional income exclusion. – For some individuals, the \$3 for \$4 waiver has allowed them to keep a cash benefit beyond the point where an SSI cash benefit would normally end in California. The independent living rate for most Californians is \$790 a month. If a recipient were to earn \$1,665 in a month, his SSI award would fall to zero. $\$1,665 \text{ minus } \$85 = \$1,580$. One-half of \$1,580, or \$790, would be the reduction in SSI. With the \$3 for \$4, the SSI cash benefit ends when the person earns \$3,245 in a month. $\$3,245 \text{ minus } \$85 = \$3,160$. One-quarter of \$3,160 is \$790. One ex-vocational counselor with many years of experience said that he worked hard to encourage clients, accustomed to poverty, to experience what life is like with higher earnings.

By contrast, some individuals, such as the person below, work just enough to maintain their public benefits and to satisfy their basic needs and [low] aspirations. In the case of such individuals, is not clear how they will adjust to the end of the \$3 for \$4. Conceivably, the person described below may seek to work and earn more to keep her independent living arrangement.

- “It [the \$3 for \$4 waiver] helped financially,” Greta said. She got an apartment last year, which costs her \$700 per month. Five years ago, Greta was evicted. “Today, I maintain residence in my own apartment, supporting myself, working two jobs as needed. Greta added that it will be hard to keep her apartment, when the \$3 for \$4 waiver goes away.”

Here is another situation, with different likely effects:

Success Stories and Survey Results

- As for the end of the SSI waivers, Pam said she would “just do the best I can.” (She is earning about \$2,500 per month). She will be “living on less money again.” The end of the \$3 for \$4 will put pressure on groceries and gas for her car. She drives quite some distance (140 miles round-trip) to a town, twice a week, to teach there. This costs Pam over \$80 per month (\$20/wk x 4.33 wks/mo = \$87/mo). The \$3 for \$4 enabled Pam to travel back to Pennsylvania to see her daughter. That may no longer be possible. Pam is a person who really wants to get off of SSI.

More than one interviewee is thinking seriously of doing something else with his or her time and energy:

- When the SSI waivers end, Sarah said that she may work less, because it is not as worthwhile to work. She will probably spend more time on school, where she is now taking 12 credits.
- Marci’s uncle offered her a job at the company’s office in a town some distance away. If not for the \$3 for \$4 exclusion, she would have stayed home. “It is almost not worth it.” But, if she left the job, it would reduce her self-esteem. She drives a little Hyundai car, 66 miles a day to and from the office. Looking ahead, she thinks she will leave her current job, and go to school. Marci wants to major in Communications at the local community college. She has applied for financial aid. School starts on August 23rd. She expects to get \$300 to \$400 per month. Going to school in Communications will help advance her work as an Advocate. “Wanting to be an advocate keeps her going.” She will enter the local community college this fall, majoring in Communications. With the change back from the \$3 for \$4 additional earned income exclusion to \$2 for \$4, work will not really pay (when considering transportation expenses and take-home pay). So, it is a good time to move toward her long-term goal.

Those who use public housing (e.g., Section 8 Home Choice vouchers) were eager to see HUD and local housing authority recognition of the need for work incentives. Especially where commute and other employment costs are high (and not eligible for IRWE treatment), net disposable income from additional work is minimal at best for those who need to pay one-third of additional income for housing, under the traditional \$1 for \$2 rule. Here’s one participant’s view:

Success Stories and Survey Results

- Pam takes advantage of the SSI waivers. The \$3 for \$4 waiver and having no Continuing Disability Review (CDR) is really helpful, she said. Another barrier to greater self-sufficiency has been the fact that rent goes up when wages go up. “HUD [U.S. Department of Housing and Community Development] waivers in the Section 8 subsidy program would help tremendously,” she added.

3. Wealth acquisition (IAs, IDAs, and the \$2,000 countable resource limitation).

– At the June 2004 meeting of the Statewide Coordinating Committee for the ISSP project, those in attendance were asked about the relative importance of the \$3 for \$4 waiver, versus wealth acquisition (relaxing the \$2,000 countable asset limit, combined with IA or similar savings accounts). The consensus view, *if forced to choose*, was strengthening wealth acquisition for a variety of reasons – feelings of security, avoiding some overpayments, wiser expenditures, and having a personal “safety net.”

- Kevin exceeded the resource limit once and got a letter from SSA threatening to discontinue his SSI. In response, the SC helped him set up an Independence Account (IA).
- Regarding his IA, Bill was going to invest in Mutual Funds. If he was able to keep his savings, he said that he might be on his own by now. An \$8K limit is Okay, but \$10K would be better, especially here on the West Coast, he said. Everything is very expensive. One has to pay \$1,000 per month for a 1-bedroom place.
- In 2000, Bill got out from under the County Representative Payee program. He established his own checking account, and opened an Independence Account, which he called a *Liberty Account*, which had \$2,700 in it. That money was quickly deposited, when he received a Renter’s aid check from the State, got a tax refund, and had a second job. Later, he used the savings to cover moving expenses.
- Anthony opened an Independence Account and has saved about \$15,000.00, which he plans to use for graduate school. He also utilized the Student Earned Income Exclusion until he reached age 22. While in the project, Anthony completed his Human Services Certificate and AA degree at a local community college. He then transferred to a State University and will soon be completing his BA in Psychology. During this time he has also regularly worked while going to school. When he has

Success Stories and Survey Results

changed jobs, he has generally found new positions on his own, seeking support from ISSP staff as needed.

There are many problems associated with the \$2,000 countable resource limit.

Here are a few illustrations:²

- Reality's 21-year-old daughter, who came with her father to the interview, and who is married and has a daughter, observed: "They save for a reason. Why should they have to spend it [to get under the \$2,000 limit]?"
- There is a big difference between the amount of money that disqualifies (\$2,000) and the amount that a disabled person needs to go to college, buy a home, get the health care needed to get better, or survive without disability checks (in the long term).
- [I would like] to put aside some of the 1 for 4 dollar SSI payment check (1/2) for allotment (voluntary) on a 6-month payment schedule to save more and get additional time to think about use of extra money.
- Ken has a lot of money withheld for IRS. Each month (or, each pay period), he has about \$600 withheld for IRS, and takes home about \$600. He would like to see SSA be able to hold back some dollars in an Independence Account, and give those dollars to the recipient every 3 or 4 months. This would encourage good spending habits, he said. Right now, there is constant pressure to spend. There should be time to plan, and to find better deals.

4. Using SSA waivers more selectively and strategically. – By and large, the opinions (and, indeed, behavior) of participants seem quite sensible in terms of private benefit (e.g., personal satisfaction). Society, of course, through government, has a right to make general rules of the game, when taxpayer income is shared with others. And, if existing arrangements are not fruitful for both the individual and society, perhaps other "win-win" possibilities need to be explored. The rules for Social Security, understandably, place great emphasis on *security* and a "safety net" for those who are unable to engage in SGA and

² The countable resource limit (\$2,000 for an individual; \$3,000 for a couple) has not changed since January 1, 1989. See Kilolo Kijakazi, "Improvements Needed in the Asset Test for the Supplemental Security Income Program," Center on Budget and Policy Priorities (March 10, 2000). In the meantime, the cost of goods and services (CPI) has gone up by more than 50%.

have little other income and wealth. Here are several ideas that we feel should be tested:

- **Health insurance.** -- Like many who have studied these issues, we recommended in our *Revised Interim Report* disengagement of certain publicly-funded health services (e.g., Medicaid) from income transfer payments, because there are many individuals who are inadvertently marginalized economically, because of their on-going need for affordable and accessibly health services. The 250% Working Disabled Medi-Cal program is a step in the right direction, but SSI asset rules still apply.

- **Work incentives to attract and retain qualified individuals in specialized employment services.** – In our *Revised Interim Report*, we suggested that waivers such as the \$3 for \$4 should not be used to attract individuals to employment services, because of a possible *woodwork effect*. We now feel that – combined with a more tough-minded approach to services (more *transactional*, with work requirements) – that it makes sense to use certain work incentives to encourage people to return-to-work. It is clear that participating in SES, and continuing with services through time, is associated with greater employment and higher earnings, on average. We think any *woodwork effect* (applying for SSI) can be handled by restricting certain enhanced work incentives such as the \$3 for \$4 and IAs to individuals who have been receiving SSI for some period of time before entering SES.

- **Making enhanced work incentives contingent and/or time limited.**
 - The ISSP project facilitated certain conclusions being drawn as to the likely impact of enhanced work incentives being “freely available.” Now, we believe that SSA should work with interested and committed

vocational rehabilitation and employment services to test (1) making the \$3 for \$4 time-limited (say, 3-5 years) contingent on effort and accomplishment, and (2) allowing existing SSI recipients to bank (in IA or IDA accounts) a portion of their SSI award and/or earnings. With respect to the \$3 for \$4, we would suggest going back to the \$1 for \$2 for an individual if earnings fall below a certain level over some reasonable period of time (say, 3 to 6 months). And, while we think a \$2,000 countable resource limit should be raised to reflect changes in the cost of living, we think SSA should experiment with allowing individuals to build countable assets to some level (say, \$15,000), with the requirement that if the person reapplies for SSI, he/she must demonstrate having no more than the conventional limit on countable resources (currently \$2,000 for an individual).

- ***Dealing with the ‘fear of loss of benefits’ impediment to greater self-sufficiency.*** – Only in Fresno County, of the four studied as part of the California ISSP evaluation, did we learn from a knowledgeable observer that there had been a noticeable shift in how members of the disability community saw the relationship between work and SSA benefits. There, we were told, the general idea of being able to work and retain needed public benefits, had taken hold. Because attaining greater self-sufficiency is a several step process, involving saying to oneself Yes to questions, such as Can I work? Do I want to work? Do I need help in finding work?, we believe that it would be wise to study – with the help of successful consumers – how messages (both positive and negative) are processed within disability communities, with a view to sustaining points of view more consistent with greater self-sufficiency. As Gabriella said to us, “Some of these people believe if they work they’ll lose their SSI. I explain that they won’t, but they don’t believe me.”

Appendix A. Interview Schedule

ISSP Project Participant Interview Schedule, 2004³

Consumer's

name: _____

Street (or mailing)

address: _____

City: _____ ZIP

Code: _____

Phone number, including area code: _____

Email address: _____

Remind consumer:

- DRAFT of story, if we decide to use it, will be sent to consumer for review and modifications.
- He/she will be asked whether story can be used in a topical report of "success stories" and/or in the project's final report.
- May we talk with ISSP staff about aspects of the story to get their viewpoint?
 Yes No

"After introducing oneself, PAUSE AND BE SOCIABLE. Say something like: "We are responsible for evaluating the *Individual Self-Sufficiency Planning* project. Now that the project is almost over, we want to highlight "success stories," in hopes of finding ways to help more people become self-sufficient (work and earn more). We need about an hour of your time. This interview is voluntary. If you don't feel comfortable answering any question, just tell me. We can skip it or perhaps come back to it. May I begin?"

Q1. How did you come to enroll in the *Individual Self-Sufficiency Planning (ISSP)* project? What factors prompted your looking at this option and deciding to enroll?

Probe for specifics, if the person mentions "own motivation" and/or influence of others (e.g., mental health professional, family, DOR counselor).

³ The actual interview schedule was four pages long, and had much more space for note-taking after each question.

Q2. After enrolling, what services did you seek out and use? Before finding a job (or, better job), how much time did you spend each month, on average, getting services from ISSP staff and others?

Q3. What ISSP and/or other services were *most helpful* to you? In what way did they help? What, if anything, got in the way?

Probe for specifics, if the person mentions Vocational Rehabilitation Services, the ISSP project, Community Mental Health, Department of Rehabilitation, family/friends, medications.

MOST HELPFUL

GOT IN THE WAY

Q4. In general terms, please describe your *work history* before and after experiencing your first acute episode of mental illness.

Include paid and unpaid work, including self-employment and sheltered work. Get a general sense of how much work (years, months, full- or part-time), highest earnings (say, per hour, or per month)

a. Before first acute mental illness (at age _____)

b. Since that time (year_____)

Q5. Who did you live with as a teenager? Did adults in your life work outside the home? What value (both verbally and by their own behavior) did adults in your life put on working for pay or profit. Did any of this make a difference in your success?

Q6. Knowing your own experience, and perhaps experiences of others struggling with mental illness, what *factors* may have made a difference in your degree of employment success?

Ask what advice the person might have for others like him- or herself.

Q7. May we contact you by phone or email to clarify anything we don't fully understand? After we write up the results of this conversation, would you kindly edit and add to what we write-up? IF SO, BE SURE CONTACT INFORMATION ON PAGE 1 IS COMPLETE.

Anything else? THANK YOU VERY MUCH.

Remind consumer:

- DRAFT of story, if we want to use it, will be sent to consumer for review and modifications.
- He/she will be asked whether story can be used in a topical report of "success stories" and/or in the project's final report.
- May we talk with ISSP staff about aspects of the story to get their viewpoint?
 Yes No

July 2004

Appendix B. Success Stories

We interviewed 10 participants at Kern County, and 17 at San Mateo. We asked interviewees whether it would be all right to share DRAFTS of their stories with ISSP staff. All 27 said Yes to that question. From our notes, we DRAFTED stories and sent them by mail to ISSP staff and to each interviewee. Where a preferred pseudonym was not chosen during the interview, we asked those interviewed (1) to give us a made-up name and (2) to make any changes in the DRAFT, and to send the marked-up DRAFT back to us in a postage-paid envelope by a date certain.

Seven of the interviewees – three at Kern and four at San Mateo -- did not respond to that request. One person told us through an ISSP staff member that she was not comfortable having her story told. Hence, we have 19 of the original 27 stories to share with readers. We use selected pieces of the other eight stories here and there in the text, in a way that does not violate privacy and anonymity rules.

To protect privacy and to provide some degree of anonymity (even though most interviewees were comfortable with details that might assist anyone to identify them), we have decided to use blanks (_____) for names of some individuals, companies, and locations. We also use SES (specialized employment service) to refer to On-Track Employment Services and Vocational Rehabilitation Services. Finally, we have substituted either BC (benefits coordinator) or SC (service coordinator) for the names of ISSP staff.

Pam

Employment, earnings, and SSA benefit status

Employment

Pam has three college teaching jobs, one with the English Department of a California State University campus. The others with two community colleges. This past summer, she also helped with a special project, working with high school kids on the university campus.

Earnings

In July 2004, Pam earned \$3,548. She was paid \$30 per hour. That means she worked about 118 hours during the month. With terms, summer school, and two months with three paydays (five Fridays), Pam's earnings are highly variable over the year.

SSA benefit status

Pam, who is 55 years of age, is an SSI Only recipient.

ISSP project enrollment

Pam enrolled in the ISSP project on May 2, 1999. Pam recalls that the Benefits Coordinator (BC) called her. Pam had joined a specialized employment service in 1997, and had a job with a minor league baseball team in the area. (Pam worked the concession stand, and later the souvenir stand.) Pam remembers the BC telling her about the project providing "a boost," and "helping her get off of SSI." SSI waivers were discussed: (1) no CDRs while in the project; (2) \$3 for \$4; and (3) maintaining Medi-Cal coverage for medications.

Services, supports, and the future

Dealing with SSA. -- "I use _____ [the BC] all the time," Pam said. There are frequent notices from SSA, and "I call _____ [the BC] when I have a question." Pam turns in check stubs twice a month. Pam just moved, and put in a change of address. The BC also provides moral support. Pam would get scared, when overpayment notices came. One time, the BC helped reduce the repayment from \$79 per month to \$30 per month. The BC also got the SSA earnings record corrected. It showed \$3,000, but the actual number was \$2,000.

Budgeting. -- The BC also helped with budgeting, by showing projected changes in SSI. It has been a "real personal program. Excellent in all respects."

Pam got her Master's degree in English in June 2004. Pam has been a client of DOR since 1998-99. DOR paid for books, school supplies (\$25), gas (\$25), parking permits and 100% of her tuition towards her Masters degree. One of Pam's goals is completely getting off of SSI. She feels that this will happen as soon as she has steady employment with benefits. "You're a regular person when you work," she said. "I took it one step at a time. The ISSP staff helps me stay on track and see an end to SSI. I don't like the government in my business."

Because she teaches at different campuses, and different programs (e.g., a summer bridge program for high school graduates mostly from migrant worker families), and because some payments are every two weeks, she experiences significant variability in monthly gross earnings. When paid every other Friday,

Success Stories and Survey Results

for example, she gets three checks (rather than two) two months of the year.

Pam takes advantage of the SSI waivers. The \$3 for \$4 waiver and having no Continuing Disability Review (CDR) is really helpful, she said. Another barrier to greater self-sufficiency has been the fact that rent goes up when wages go up. "HUD [U.S. Department of Housing and Community Development] waivers in the Section 8 subsidy program would help tremendously," she added.

As for the end of the SSI waivers, Pam said she would "just do the best I can." (She is earning about \$2,500 per month). She will be "living on less money again." The end of the \$3 for \$4 will put pressure on groceries and gas for her car. She drives quite some distance (140 miles round-trip) to a town, twice a week, to teach there. This costs Pam over \$80 per month ($\$20/\text{wk} \times 4.33 \text{ wks}/\text{mo} = \$87/\text{mo}$). The \$3 for \$4 enabled Pam to travel back to Pennsylvania to see her daughter. That may no longer be possible.

Personal history

Onset and work history

Pam entered the mental health system around 1984. She began receiving SSI at the age of 36, in 1985. Prior to involvement in the ISSP project, she had a very spotty work record. Before reaching age 18, she started a house cleaning business with her mother-in-law, and worked for a car dealer in the Accounts Receivable Department. She never made enough to file income taxes. "Until I met with the ____ program (formerly a part of day treatment), I got nothing but bad news from Mental Health. They ridiculed me, wouldn't listen to me and wouldn't take me seriously. The ____ program staff put a face to a number. They supported me and got me help. Because of their help I took the step towards school. They ran interference for me."

Messages during the teenage years

Pam grew up with her mother and father, three brothers and one sister. Pam is the oldest of the children. Pam babysat the kids when she was 16, and her parents had a grocery store. Pam's father was a journeyman meat cutter. Pam's mother felt that "girls should work until they get married." Pam's father indicated that "girls should find a husband and have kids." Only Pam and her youngest brother went to college. That was more difficult than it could have been, because Pam's father would not reveal his earnings on financial aid applications. "It's nobody's business," he said.

What accounts for your success? Advice for others

Pam mentioned three things:

- *Coping with her mental illness.* – Staying on medications, and the right ones, has been important. Pam has a psychiatrist and a pharmacologist on whom she relies. She also sees a therapist twice a week, and she keeps a journal that she shares with the therapist. Pam also makes To Do lists, and crosses them off as she successfully deals with each.
- *Going to her support people.* – When something occurs, and she has trouble dealing with it, she goes to her support people for help. For her, it is important to get feedback to deal with anxiety. For example, a student came into her class and left his headphones on. She discussed this with her support people, who helped her understand her feelings and examine options. Based on what she learned, she told the student that he/she could go outside to listen, but couldn't use the headphones when in class.
- *Attitudes.* – Pam's advice to others is "Let mental illness be a stepping stone, not a barrier."

Asked what advice, if any, she would offer others?, Pam said:

- "Take advantage of the programs offered. Use their support."
- "If you don't know what you want to do, go to school to find your niche in life. Find your

Success Stories and Survey Results

passion and follow it. At first I didn't know I wanted to teach. I did some tutoring then realized I wanted to teach. But it started with a love of English."

- "Don't stop taking medications – they're extremely important."
- "Try, try and try again."
- "When you run into barriers, go to your support people."

Don Juan

Employment, earnings, and SSA benefit status

Employment

Don works for a security company, at nightclubs dealing with people who have had too much to drink.

Earnings

In July 2004, Don earned \$412. That month, he was paid \$7.00 per hour for about 59 hours of work. He typically works 55 hours per week. The security company recently cut his hours. He was working four days a week, but now works only two days a week.

SSA benefit status

Don, who is 31 years old, is an SSI Only recipient.

ISSP project enrollment

Don enrolled in the ISSP project July 23, 2002. He was referred to the project by his DOR counselor and by _____, an employment service staff person who is located in the supportive services office at a local community college. _____ had been providing ongoing support for Don off and on during his school career.

Don said that he had signed up with DOR. The Vocational Rehabilitation Counselor referred him to the specialized employment service (SES). According to Don, the VR Counselor said "they [the SES] will help you find a job." Don ended up finding his security job on his own. His Dad knew someone and referred Don.

Services, supports, and the future

A long-time ago, the SES provided Don with a resume-writing class. The ISSP staff help with (1) reporting pay (uses a worksheet, because employer pays in cash) monthly and (2) help with overpayment (SSA wanted \$79 per month; the BC got it down to \$35 per month).

Don recalls taking a resume-writing class offered by [the SES]. DOR provided clothes for interviewing (someone went with Don to a department store). DOR also paid for his uniform and associated equipment (Mace holder).

Regarding services, asked if anything could be better, Don said he would like more assistance finding a better job. Don is tired of security work, although he has "learned some good skills" doing that kind of work (dealing with people). Right now, he wants another job. Don said that he wants to quit the security company, and get a different job as (1) a janitor; (2) doing landscaping; or (3) as a deliveryman. He signed up with Placement Pros, a temp agency, but got no calls. Angelina gave him information about Career Services Center. But, Don said it is hard for him to find a job on his own. He would really like help in finding a better job.

Personal history

Onset and work history

Don had a summer job as a janitor at a junior high school. That was about all the work he did before the mental health diagnosis at age 17. At that time (1990), Don was diagnosed with *out-of-control schizophrenia*. Don got into a brawl with police. He hit police officers with his fists. Police officers hit him with their batons. He was taken to juvenile hall, and then to the county's psychiatric ward. He was there three days. He was given HALDOL and COGENTIN. Don's grandmother helped Don qualify for SSI at the time. From the psychiatric ward, Don went to a locked facility for youth.

Students and other friends knew about what happened. Having a mental health diagnosis was embarrassing. Don did not do much work from 1990 to 1996. After that, he had several jobs, including a fast-food restaurant in _____; construction work with his uncle off and on; roofing work with companies in _____; _____ Bar & Grill, in _____; and his present security job, which he has held since 2000 or so. In 1999, Don got a diploma from the Adult School in _____. Don feels that SSI helped him go back to school to get his diploma (1999). At some point, Don went to the community college for a year to be a juvenile counselor. Don takes a small dose of RESPIRDOL (1 mg) every day. He reports that it is helpful and calming.

Messages during the teenage years

There was a lot of violence in Don's home, as he was growing up. He lived with an aunt and uncle between ages 7 and 10. They emphasized studying and doing one's homework. Don left his mother's side of the family at age 12, and went to his father's side of the family. His father drank and got into fights. He also had a Drinking Under the Influence (DUI) conviction. Don's father worked as a dishwasher at a California State University campus. When Don left high school before graduation, his father emphasized the importance of having a diploma. As a teenager, Don went back and forth between his father and his grandmother, who lives in a town some distance away. Except for keeping his room clean, and washing the car, Don was allowed to do whatever he wanted to do. Father and grandmother didn't care much about school. The grandmother had a clothing store, from which she retired.

Don attributes his *anger problem* largely to his mother, who had a nervous breakdown and carried a schizophrenia label. His mother would torment and hit him as a young child. He had no kids to play with, and grew up unhappy. Like his father, Don did some drinking, but didn't get into drugs or gangs.

What accounts for your success? Advice for others

Successfully handling his psychiatric disabilities has been a "long, slow process." Going to church has been very helpful. Don likes people now, and is more outgoing. He would advise others "not to give up," and not to use their experience to ruin their lives (say, by going to jail). He advises others to "do something with your life."

Wayne

Employment, earnings, and SSA benefit status

Employment

Wayne works for the County Human Services Agency.

Earnings

In July 2004, Wayne earned \$1,899. He was paid \$11.79 per hour. Wayne works 40 hours per week.

SSA benefit status

Wayne, who is 45 years of age, is an SSI Only recipient.

ISSP project enrollment

Wayne entered the ISSP project on October 28, 2002. He was in a County Mental Health Drug Diversion program when a counselor referred him to the ISSP. He says that the more sober he got, the more reality set in. He started to resent the drug dealers and decided he wanted to apply himself in a different way. He met with the Service Coordinator (SC) and Benefits Coordinator (BC) two or three years ago.

Services, supports, and the future

Angelina saw right away that he was good with people. Wayne describes himself as a "people reader." He grew up in Southern California, where there was a lot of gang activity. He did everything he could to avoid getting involved in the gangs, even though his three cousins were the original gang leaders of _____'s most notorious gang in _____. He got involved in a political group for youths; he was an intern for a superior court judge and worked for a city attorney for a while; he spent most of his time in a theatrical group as a teen. He was a founding member of the group. From all these experiences he learned how to "deal with different characters and personalities." The SC saw this in him and helped steer him towards working in human services.

A number of things in the ISSP project helped Wayne. He learned interview skills from _____, who he described as strong and helpful. ISSP also hooked him up with the Department of Rehabilitation and a distance learning State University program.

From the job developer he learned how to write a resume, cover letters, and thank you letters. Everything at ISSP "was very positive. Once I got into the system, I felt sheltered and taken care of. If I couldn't come into the office, the SC or BC would come to my house."

Perhaps the most meaningful comment Wayne made about the ISSP project is this: "I would have become a notorious criminal if it weren't for the BC, the SC and the others."

Personal history

Onset and work history

Wayne says the first time he was in the hospital was at the age of 9. He lived around gangs in _____, when the Crips and Bloods first got started. A stray bullet almost ended his life, hitting

Success Stories and Survey Results

him in the eye and blinding him in one eye. Today, you can't tell that he has a bad eye unless he lets you know. Looking at him, the eye seems normal. After he got out of the hospital he learned martial arts, and by 13 was a first-degree black belt. First Don they call them. He met a lot positive minded people in the dojo."

At the age of 20, Wayne married a girl where he lives now, and moved to her town. Jumping ahead in time, about a semester from graduating from California State University, Wayne was jailed for 120 days for a violent act. After that, he went back to CSU to finish school and to get his degree (major in psychology and sociology, minor in Chicano studies). He promptly took the diploma to show his friends, used it to roll a joint, and lit it up. That was in 2000. After that, he got deeper and deeper into the drug world, not caring about what happened to him. Jail, then this. At one point, a sheriff deputy approached him and told him, in so many words, that he was headed toward personal destruction and he needed to change his life. Wayne says this had an impact and he felt weak and low. He saw he was heading toward a felony situation if the violent behavior continued. He clarified that his violent behavior was only directed at "thugs and bad people" but still he worried that he might get carried away on drugs at some point and do some real damage. At this point he called 911 and said, "Come and get me. I don't care anymore." Shortly after this he was brought to the County Mental Health system, and was diagnosed with bipolar disorder. That was 2001.

At that point, Wayne said, "I started making short and long term goals." He started his medication, and got into a drug and alcohol diversion program. Three years ago he came to the ISSP project. He started getting opportunities right away. About a month after enrolling he did some research and found that he qualified for some 27 county positions; he sent out 11 applications. He also got involved with a unit of the CSU system. ISSP staff helped him get into their distance-learning program. The requirement was that he have a college education and be a specialized employment service (SES) client. This is an internship/employment training program that leads to certification as a Workforce Accommodation Specialist.

Currently, Wayne is a Human Services Technician for the County Department of Human Services. It's a full-time position that he has held for seven months. Soon he plans to take an examination to qualify for a Social Worker position.

Wayne is married. He has two sons who are adults, and two daughters who are younger. One is in high school, and the other, first grade. Wayne also has a child on the way, due January 2005.

Messages during the teenage years

Wayne grew up with both parents. He describes his mother as a strong person who was "always there." She worked for a wealthy family as a live-in nanny. He describes his father as a workaholic soldier. He was in the military service for 35 years, then retired with the _____ Corporation. The steady message as a child was, "Stay active. Work hard. Play just as hard. Whatever you do, do your best. Don't back down. Always be prepared for the enemy. Expect the worst. Don't let a victory confuse you. Winning a battle is not as good as winning the war." Later in life, when he wasn't working or doing something that would make a better life for himself and his family, "It ate away at me; a voice was drilling punishing me when I was failing."

What accounts for your success? Advice for others

Wayne's advice to others is to stop looking for that instant, fast way to make it and being afraid to work, and not to become too dependent on SSI. He says, "If you need it and you are mentally and physically not able to work, that's one thing, but if you can work and lose a job, start again. You'll find something. You will survive. Don't fake it to just get a check and blow it on drugs and drinks." And above all, look for the signals that you're doing the wrong things for yourself. It will show by how your life is and how others are. Pay attention to the signs, fight those bad habits, and you will win."

Marci

Employment, earnings, and SSA benefit status

Employment

Marci works for ____ Counseling Service, a firm owned by her uncle, who is a licensed human service professional. Marci works at the counseling office in _____, 66 miles round-trip from her home in _____. She has been there about two years. Marci does mostly paperwork, but is also a Domestic Violence Facilitator, which requires 40 hours of training. The office counsels people around anger management, domestic violence, and substance abuse.

Earnings

In July 2004, Marci earned \$893. She was paid \$8.50 per hour for about 105 hours of work. Typically, she works 20 hours per week, which is the equivalent of 87 hours a month (20/wk x 4.33wks/mo). She takes home about \$275 (net), twice a month. Without earnings, her SSI check would be \$790 per month. *NOTE:* Marci said that for the most part, she has been working full-time at the counseling service. At the time of our interview (early August 2004) she was working about half time, because her house caught on fire, she lost most of her possessions, and she was dealing with that crisis.

SSA benefit status

Marci, who is 37 years old, is an SSI Only recipient. SSA has just asked (August 2004) her to complete the paperwork for an SSDI application. Working with ISSP staff, Marci completed the application near the end of August and sent it in.

ISSP project enrollment

Marci enrolled in the ISSP project on January 3, 2001. Due to her illness flaring up again, she had been doing mostly housework and gardening at home, but "there is only so much of that that you can do." She was very sad when she asked her 15-year old daughter, who had a job, for money. She decided to take action toward paid employment.

Marci went through the SES orientation, and spoke with the BC afterwards. Marci knew it was up to her to get a job. She had had a number of jobs, including selling cars and insurance (at age 27). She made good money at those jobs (about \$3,000 per month). She and the BC talked about the SSI waivers. Without the \$3 for \$4, "there is a good possibility that I wouldn't have gone back to work." She went on to say, "When you have achieved a certain sense of security (with SSI), you don't want to place it at risk."

"I had a lot of questions," and "[the BC] was really helpful!," Marci said. She noted how helpful the SC was as well.

Services, supports, and the future

When Marci signed up for the ISSP project, she signed up with the Department of Rehabilitation (DOR) as well. "It took about one year to get off my tail," Marci said. About two years ago (Fall 2002), she started back to work, and her DOR counselor quickly closed the case after three months. "I cannot figure three months is enough for success," Marci said. The DOR counselor was so pessimistic about Marci working that she got busy "to show him." Marci looked for about two years for a job. She was often among the top three or four being interviewed (out of 200 applicants), but her lack of recent work

Success Stories and Survey Results

experience stood in the way.

As for the BC and SC, they turn in pay stubs for her in a timely fashion. If there is a question or issue with SSA, the BC has dealt with it. The postcards that ISSP staff have sent out have made a big difference. Getting a postcard saying "Excellent job" has meant a lot to her. The SC and BC also provide emotional support. They have been responsive whenever she needed some support or assistance, as when she was recently burned out of her house.

Marci finally got a job on her own, through her uncle, who lives in a Southern California city, and has a counseling company with offices in _____ and _____. Marci saw her uncle at a cousin's wedding. Even though the uncle had seen Marci at the "nut house," as Marci described it, rocking to and fro, he apparently saw enough change to take a chance with her. He offered her a job at the company's office in a town some distance away. If not for the \$3 for \$4 exclusion, she would have stayed home. "It is almost not worth it." But, if she left the job, it would reduce her self-esteem. She drives a little Hyundai car, 66 miles a day to and from the office. Looking ahead, she thinks she will leave her current job, and go to school.

Marci wants to major in Communications at the local community college. She has applied for financial aid. School starts on August 23rd. She expects to get \$300 to \$400 per month. Going to school in Communications will help advance her work as an Advocate. Marci said that she is a fighter, and has been since acquiring an understanding of her rights (e.g., to choose her psychiatrist; to get help in accessing her preferences; etc.). She is also a good communicator, and makes a good appearance, and wants to be a Mental Health advocate, testifying before Congress. When the Governor visited her town some time back, and parents were out demonstrating not to cut services for their children, she got a burning sensation in her gut, and feels that was a sign that she had a calling to be an advocate. "God gave me a big mouth for a reason."

Personal history

Onset and work history

Marci was diagnosed at age 19 with bi-polar and multiple personality disorder. She was a rebellious youth, dropping out of school at 15, and running off with the love of her life. She had three kids, and her own place. Her girls are now 18, 20, and 21, and Marci has three grandchildren. As a teenager, she was using drugs. She tried to commit suicide with MYDOL at age 14. Her mother and father worked in the fields, and Marci remembers selling soda at age 3-4. She delivered newspapers at age 11. She also sold Christmas cards. At age 25, she worked for thirteen months as a Credit Clerk for a company. She had several other jobs, averaging about four months each. She would get "pissed off" and quit, or bored and quit. Her jobs included fast foods and using a scanner to put price tags on items sold at retail. About age 26-27, she sold cars and insurance. She was always good at sales. Selling cars paid the best. She earned about \$3,500 a month for a while. Her siblings and parents helped with childcare. At age 27, she was not very consistent taking her medications. Without health coverage, she started taking half-doses, and ended up 6 days in the hospital. The lesson: taking medications faithfully is very important! Since age 28, Marci has been on SSI.

Messages during the teenage years

Marci's father was from Mexico. He worked in the fields. Now, he is a truck driver. Her mother was from Texas, and left school after about three years. She also worked in the fields. She worked for _____ Chemical for over 20 years. She is now retired. Both parents were good role models. Marci was to be the "perfect kid." She went to Catholic schools, and was going to go to college. But, . . . she ran away at an early age.

What accounts for your success? Advice for others

Success Stories and Survey Results

Marci said that the illness makes a big difference, along with the capacity underneath. At age 28, Marci spent time at the hospital. She stayed in her room for about two years. Her daughters, at that time, raised themselves. Her case manager was great, and medications helped. Marci attributes getting better to her capacity ("It is me!"). Her daughter, who at the time was 16, was a file clerk at County Mental Health, and it was through her daughter that she came to know her rights. Marci followed the advice of others, especially ____ and ____, two mental health workers. Because she couldn't drive, she missed a lot of appointments. She asked the case manager, impolitely, to drive, and he did. She knew that she had a right to change doctors and did, and then when the new doctor moved, she insisted on staying with him. Now, she drives and has a good job. The office and the person reflect on each other. So, she works hard and well. She doesn't want to look stupid. She wants to reflect well on the counseling office.

Economic security and handling her mental illness are keys. "Wanting to be an advocate keeps her going." She will enter the local community college this fall, majoring in Communications. With the change back from the \$3 for \$4 additional earned income exclusion to \$2 for \$4, work will not really pay (when considering transportation expenses and take-home pay). So, it is a good time to move toward her long-term goal.

Richard

Employment, earnings, and SSA benefit status

Employment

Richard works for County Mental Health, as an Office Services Assistant (Clerk II).

Earnings

In June 2004, Richard earned \$1,290. He was paid \$12.90 per hour for 100 hours of work. Richard generally works 25 hours a week (5 hours per day x 5 days per week).

SSA benefit status

Richard, who is 43 years of age, is an SSDI Only beneficiary. He receives \$752 per month. Back in 1993, when he started with a specialized employment service, Richard got SSI.

ISSP project enrollment

Richard enrolled in the ISSP project on May 10, 1999. At the time, he was experiencing some on-going work-related issues and utilized project services to assist in mediation and to provide on-going support. Richard said that the BC "has always been there for him."

Services, supports, and the future

The BC helps in two ways:

1. She helps with his use of the *Subsidy* work incentive. Once a year, BC helps with SSA paperwork and annual reviews. A *subsidy* shows that in some way the person's earnings are being augmented. In this case, Richard is paid more than the value of the services he provides. For example, Richard is classified as an Office Services Assistant, but he does not do the same duties as other Office Services Assistants in Community Mental Health. His duties are tailored to his disabilities. Social Security asks for an accounting about every three years. ISSP staff provides documentation in the form of job descriptions, and BC writes a letter outlining the services that she provides in helping Richard to maintain his employment.
2. BC helps him figure out solutions to personal problems. These problems have included (1) dealing with anger in the workplace; (2) getting to work on time; and (3) figuring out exactly what to do. Right now, Richard's duties include shredding documents, calling clients, keeping pharmacy receipts in order, and filing records.

Except for SES, Richard has "always had to hunt people down." The BC has "been a good friend," and "always available when needed." Richard feels that he is "not just a statistic. They take an interest in you."

Personal history

Onset and work history

Richard got into serious trouble with the law, when he was about 18. He thought of suicide at that time, but did not act on it. He moved from his mother's home in the Central Valley to a county up

Success Stories and Survey Results

North, to be with his father. There, he received some mental health services, and attended the community college. Most all of his jobs involved manual labor from then until a motorcycle accident in 1990. Richard said he was in the military service for a while.

A motorcycle accident in August 1990, left Richard with a messed up leg. He lost about half-an-inch of one heel, and now wears a lift in one shoe. He couldn't work for a year or two. At that time, Richard applied to SSA for benefits. He was initially denied, but received benefits on appeal.

Richard started with [the SES] around 1993. Richard has had several jobs within the County. He had volunteer position with the County Coroner's Office, and served as a Greeter for individuals coming to Mental Health Offices. Since then, he has had a number of different jobs within County Mental Health.

Messages during the teenage years

Richard lived in _____ with his mother between the ages of 13 and 18. He had five brothers and sisters. His mother worked as a Special Education teacher in the County Schools District. Richard's mental illness arose at about age 18. He got into serious trouble with the authorities, and it was felt that the trouble, in such a small town, would prevent work. So, Richard moved to a county up North, to live with this father and to get a fresh start. Richard had to get counseling as a condition of probation.

Richard's father worked at a state prison. Father basically said "it is up to you," and "treated me like a man." Richard's father said "To get anywhere, you need to know what you are doing." He stressed to Richard the importance of working with mental health and legal authorities, if he wished to have a job and to get on with his life.

What accounts for your success? Advice for others

Being in [the SES] "test group" was helpful.

Richard also feels that his mental illness is not as severe as others. "There but by the Grace of God, go I." Mental illness overwhelms some people. Some get better and then slide back. Richard slides back, but the pause (or, relapse) is shorter than it is for others. Richard feels fortunate.

Richard never thought that he would be employed. He asked for help. He likes his job with County Mental Health.

He said: "Contentment is a key. There are people just like me. I have reached a modicum of contentment. If I can do it, others can."

Gabriella

Employment, earnings, SSA benefit status

Employment

Gabriella is a laundry worker at a convalescent home in the city where she lives. She has had this job for two months now (August 2004) and really enjoys it.

Earnings

In July 2004, Gabriella earned \$1,279. She was paid \$7.30 per hour for full-time work (typically 40 hours per week). She works from 4:00 pm to 12:30 am, five days a week.

SSA benefit status

Gabriella, who is 55 years old, is a concurrent beneficiary (SSI & SSDI). She receives \$319 per month in SSDI. In the absence of earnings, her SSI/SSDI total would be \$810 per month. In other words, absent earnings, her SSI is \$491 per month. She is in her Extended Period of Eligibility (EPE), and should be off SSDI. SSA is evaluating her case. ISSP staff does not anticipate that she will be declared "no longer disabled."

ISSP project enrollment

Gabriella enrolled in the ISSP project on May 19, 1999. She says that she had gone to a lot of places to get a job. "I always wanted to get a job, but I don't have any skills – but I can use my hands," she said. She doesn't recall how she learned about the ISSP project, or why she came to the program.

Services, supports, and the future

"[The SC and BC] – they're like friends to me. They helped me find a job, showed me how to present myself in an interview, and helped me with reading newspapers and letters." Gabriella said the SC and BC knew her problems (depression and limited skills) and they helped her in so many ways, she can't even begin to explain them all. She said they are always available and "never say 'no.'" They also helped her understand the Social Security system. She summed up her judgment of BC and SC by saying, "They deserve a medal!"

Some services were not very helpful to Gabriella. She said she went to the same Department of Rehabilitation counselor 20 times, who told her that DOR couldn't help her, because of her limited work skills and the fact that she couldn't read. She was also disappointed in a County Mental Health counselor who she had for group therapy. "You can't get a hold of her; she doesn't respond," Gabriella said.

Through her own persistence, Gabriella obtained her California Driver's license, using a Spanish language interpreter.

Personal history

Onset and work history

Gabriella was first hospitalized in 1991, when she was about 42 years of age. She was in the psychiatric ward a couple of times for depression after her third husband died.

Success Stories and Survey Results

Gabriella has been married three times. Her first marriage lasted 9 years. Her husband was an alcoholic and abused her. They had 5 children. She said her second husband married her to “get his papers.” This marriage lasted one year, and they had one child. During both of these marriages, Gabriella worked seasonally, usually three to four months a year. When her third husband died, she got some money and bought a house. But during that marriage, Gabriella didn’t work because her husband didn’t believe a wife should work. Gabriella said it was difficult not to work during this seven-year marriage. After her third husband died, Gabriella started having problems with depression. She began receiving Social Security benefits at that time.

When she joined the ISSP project, Gabriella initially expressed an interest in learning to read and write, but shortly after intake she went back to seasonal employment in the potato sheds. She stayed with this seasonal job for about a year. During this time ISSP staff assisted her with a Department of Motor Vehicles (DMV) fine that was being garnished from her wages. It was discovered that she was actually due money back. These earnings were before the SSI waivers, and project communication with Social Security offices was in its infancy. A lot of confusion arose over overpayment amounts, and the entering of earnings information into the SSI system. Gabriella also had a payee at this time, and staff learned very quickly the problems that were caused when the payee was not kept in the loop. Gabriella owns her own home and has a mortgage payment. Historically, the payee paid the mortgage. With lower SSI because of earnings, the payee was running short of money and Gabriella wasn’t saving any of her earnings to make up the difference. There were a couple of real tight months. Negotiations with the mortgage company continued.

Once this employment was concluded the BC and SC assisted her in filing for unemployment benefits. She returned to employment in the packing sheds in 2001. Once again it was seasonal work. In 2002, she began to work more intensively with the SC on job search. She obtained a training position with a community-based organization. However, due to a family emergency (brother’s death), she had to quit within six weeks. The SC connected her with Department of Rehabilitation and, through the SES, a job with a maid service was obtained. This job lasted about six weeks. She was unable to keep up with overtime demands and the pace that was required. It was during this employment that she was having problems with a niece. Gabriella has a heart as big as the outdoors and is frequently called upon by family to assist. In November, the SES assisted with placement at a discount retailer. Conflicts with co-workers ended this job. Significant family problems were also occurring at this time.

Throughout this entire time, problems with the mortgage company continued – late penalties added without reason, a change in mortgage companies occurred - and this added it’s own flavor. The payment system was changed and when Gabriella wasn’t able to keep up with the change she was actually harassed by an individual who threatened her with the loss of her house. The SC has worked persistently to help Gabriella maintain her housing. In June of this year the SC assisted Gabriella in obtaining her most recent employment. Much work has been done on work place behaviors, getting along with co-workers, etc. Intensive support is being provided and to date it appears that this job is a good fit for Gabriella.

Messages during the teenage years

Gabriella was born in _____ and was raised by her stepmother. Her birth mother, she was told, didn’t want her. Apparently she was an alcoholic. Gabriella was told that she may have had some brain damage while in the womb: “I was told that alcohol affected my brain, which made it difficult to learn to read later in my life.”

Her father divorced her mother and remarried another woman, who became Gabriella’s stepmother. Then he left that family for another woman. Her stepmother remarried when Gabriella was 11 or 12, and both her stepparents continued to raise her. The new father was a field contractor. There was a clear message from these stepparents: “You need things for yourself; you’ll need to work in order to

get them.”

What accounts for your success? Advice for others

Gabriella believes it's important to work. Anyone who collects SSI and doesn't work "is just lazy!" I say "get off your ass and get a job." Some of these people believe if they work they'll lose their SSI. "I explain that they won't, but they don't believe me."

She would like to tell people not to be scared. She has advised people to talk with the SC and BC, but she doesn't know if any of them did.

Don Wilson

Employment, earnings, and SSA benefit status

Employment

Don was scheduled to start a new job the week following our interview, with a discount store.

Earnings

In July, Don earned \$478. He worked eight hours a day, and was paid \$7.25 per hour. In his new job, he will also earn \$7.25 per hour. He is scheduled to work eight hours a day, four days per week, and be available for some fill-in work.

SSA benefit status

Don, who is 26 years of age, is an SSI Only recipient.

ISSP project enrollment

Don enrolled in the ISSP project on September 25, 2003. A counselor at the _____ Clinic (operated by County Mental Health) told Don about the ISSP program. When he went to the ISSP office, he met the BC at a SES orientation. He'd been seeking work on his own ("I couldn't find a job no matter how hard I tried") and says the ISSP was "just what I was looking for."

Services, supports, and the future

Don says that one of the most important services he got was learning interview skills. He learned how to look an interviewer in the eye, the importance of good posture, to listen to the questions carefully before answering, and making sure he doesn't talk too fast. Being calm in an interview was also an important lesson. He said all this helped him build self-confidence, and shortly after taking the interview skills class, he got his first job. This was after years of unsuccessfully trying to find work on his own.

He also appreciated the help he got with benefits. Staff helped him understand how wages affect SSI, and they provided lots of support. He said ISSP staff told him to "stay strong".

Personal history

Onset and work history

Don first started experiencing mental illness around the age of 16. He got increasingly withdrawn, spending more and more time alone in his room. He said, "I didn't know who to talk to." He was never hospitalized. When he was about 19 years old, he went to the local community college where he took some classes. There he got a summer job as a janitor that lasted about 3 months. But his mental health problems persisted, so when he was 23 years old he went to the Mental Health Clinic and got help and was put on medications.

In early 2004, Don took a four-month janitorial training position at a convalescent home that the ISSP staff helped him get. After completing the training program, he got a position in June 2004, cleaning buildings at a business called _____. He worked there 24 hours per week, but it was a graveyard shift, which he didn't like. He quit this job after a month, in July 2004. Next week (mid-August 2004)

he starts his new job.

Messages during the teenage years

Don grew up his mother. He recalls that she worked as a clerk at _____, a department store, and also at a clinical lab. His father, who he didn't live with as a teenager, worked "off shore" and is now at a different department store.

Don's mother always said that work was important. And, Don's point of view is straightforward: "People should work! If they don't it's probably because of drugs."

What accounts for your success? Advice for others

Don had some advice for his peers: "I know sometimes it's hard, but keep trying. Know who you are, and have perseverance. There's always light at the end of the tunnel. Keep your faith in God; he'll never let you down. And remember, where there's a will there's a way. Keep going forward and just put one foot in front of the other."

Don also acknowledges that some people with mental illness may never work. He said, "Some people come from dysfunctional families. If they were told over and over again as a child that they're not worth anything, it's like it's rooted in them. They're kind of traumatized."

Kevin

Employment, earnings, and SSA benefit status

Employment

Kevin works as a dishwasher for a coffee roasting company, a coffee shop. He has been in that job since November 2000.

Earnings

In July 2004, Kevin earned \$566. He is paid \$8.00 per hour, and typically works 17 to 25 hours a week.

SSA benefit status

Kevin, who is 49 years of age, is an SSI Only recipient.

ISSP project enrollment

Kevin enrolled in the ISSP project on October 4, 2001. At the time, he had a job as a janitor at the sheltered workshop operated by the SES. An SC told him about the ISSP project. Kevin recalls thinking that he was surprised the program existed. In making the referral, staff felt Kevin would be helped by the extra support of the ISSP project.

Services, supports, and the future

Kevin said that ISSP staff helps him with wage reporting, income tax filing and overpayments. He also said that the SC has helped him understand the letters he has gotten from SSA. The SC indicated that Kevin's mother also helps him interpret the SSA letters. The SC also did some job coaching, and helped him with medical reviews as ordered by SSA.

Kevin wasn't sure if he was taking advantage of any waivers, but the SC says he's been on the \$3 for \$4 waiver since he began with the ISSP project. However, this didn't seem like a selling point, since Kevin's not a big spender, according to the SC. It seems that it was the opportunity to have a job that motivated Kevin. The extra income was nice, but not necessary. Apparently Kevin exceeded the resource limit once and got a letter from SSA threatening to discontinue his SSI. In response, the SC helped him set up an Independence Account.

According to Kevin, the most helpful services have been income tax filing assistance and interpreting overpayments letters from SSA.

Personal history

Onset and work history

Kevin's father died at age 41 in 1961. Kevin's mother married Kevin's stepfather in 1968. The family traveled around a lot because Kevin's stepfather, who worked for the federal government, was a mapmaker. As a result Kevin lived in many of the western states. He attended high school in _____, Oregon, and in a town close to where he lives now, and as he put it, "I barely graduated."

Success Stories and Survey Results

Kevin says he first experienced mental health problems at eight years old, in November 1963. He didn't go into much detail about this. While in high school he tried the Regional Occupational Program (ROP), but he "didn't graduate" from ROP.

Upon graduating from high school, Kevin said he sat around a lot. He told himself he should be doing something productive but found it difficult to get started.

Eventually he got a job in a sheltered workshop, doing piecework. Later, he began doing janitorial work. Kevin's counselor started him in the sheltered workshop in September 1976. She referred him to the sheltered workshop several times, and each time he ended up leaving, due to his apparent paranoia and delusional thoughts. His counselor then put that idea on hold for a while. After a few years, Kevin called again, requesting to work at the sheltered workshop. When his counselor asked what was different about him this time, he replied "CLOZARIL." His counselor got him into the sheltered workshop and he was like a "changed man." He could focus and proved quite productive. This led to a referral to the janitorial program where his performance resulted in his supervisor calling him "the best janitor he had ever had." From this point on Kevin took an active interest in staying employed.

Kevin said his first "real job" was the one he has now, as a dishwasher at _____ Company, a small local coffee house. He started this job nearly four years ago, in 2001. From his and staff's account, he's doing well and the owners appreciate his work. When asked how he got the job, he replied, "Someone told me about it." His counselor found the job lead and worked with the job developer to help Kevin get the job.

It appears that a change in medication in 1997 (to CLOZARIL) has had a positive impact on Kevin's life. Up to that point, as he put it, "I did a lot of sitting around."

Messages during the teenage years

Kevin's stepfather traveled a lot because of his job, and therefore so did Kevin. His stepfather worked as a mapmaker for the federal government. Kevin recalls that his mother worked during World War II for the United Service Organizations (USO).

Kevin doesn't recall his mother or stepfather talking explicitly about the importance of work. When asked why it was important for him to work, Kevin stated "I don't want to feel sorry for myself," implying that work helps one feel important, and not working is not good for his self-esteem.

What accounts for your success? Advice for others

Kevin believes that medications aren't enough for a person to rely on. While they were helpful to him, ultimately a person needs to take action, "one step after another" as he put it. He also felt that group therapy was useful for him. Kevin believes that people need "something to wake up to" each day, and that work fulfills this need. For others, he said they might need a lot of encouragement, like a pat on the back. They need to get out into the public, and find a job they like. Then take it "one day at a time." Above all, Kevin says, "don't feel sorry for yourself."

Tom

Employment, earnings, and SSA benefit status

Employment

Tom works for a local non-profit agency, as an Assistant Case Manager, 10 hours per week. Tom drives clients to their various appointments, provides medication support, serves as a role model, and helps case managers in whatever way he can.

Earnings

In July 2004, Tom earned \$1,027. He was paid \$12.88 per hour for about 80 hours of work. Year-to-date, Tom averaged \$1,089 per month in 2004. His hours vary, based on the non-profit agency's workload.

SSA benefit status

Tom, who is 60 years of age, is an SSI Only recipient.

ISSP project enrollment

Tom enrolled in the project on March 3, 2003. Tom was employed at the non-profit agency as an Assistant Case Manager when he heard about the ISSP project from some co-workers. He heard that extra benefits, especially increased SSI amounts, were available. This was the primary reason he contacted the ISSP project, but as he said, "I was also curious."

Services, supports, and the future

From a BC, Tom got help understanding what the \$3 for \$4 waiver was all about, and he got help applying for it. Also, as that waiver comes to an end, he's been getting help preparing for that event. The BC also helped Tom write a PASS plan – right now, Tom's saving for a car. Tom is hoping that getting a car through a PASS plan and having reliable transportation will allow him to be available for more work hours. Tom said that the SC and BC help him by "staying on top of things; they don't let anything slip." For example, they remind him about submitting pay stubs regularly. Overall, he says they provide a "cushion" with respect to dealing with SSA.

Tom felt that one thing the ISSP staff could have done better was to make the project better known, perhaps with mass mailers. He feels fortunate he's in the program, but he learned about it from co-workers – perhaps he would have heard about it earlier if there had been more comprehensive advertising.

Tom is a member of the local Mental Health Consumers Hall of Fame. His biographical sketch describes the struggles he has faced overcoming schizophrenia, and makes his point that an important aspect of recovery is giving back to others. He was helped enormously by two people at the non-profit agency where he worked. They saw potential in him and encouraged him to start on the road to recovery. His decision to ask for a helping hand "was the turning point in his life and got him on his path of wellness and recovery."

Personal history

Onset and work history

Tom's first experience with mental illness was at the age of 25, when he was diagnosed with paranoid schizophrenia. Prior to that he had held a number of jobs: in high school he worked at an ice cream store; he spent 4 years (during the Vietnam War) in the Military Sea Transport Service as a civilian crew member; he was also an installer for the telephone company for a year. At age 25, he had an "emotional breakdown" and began seeing a psychiatrist. When he was 28 he was in a supported housing program at the non-profit agency, and later entered their sheltered workshop.

Eventually, Tom took a peer counselor job at the non-profit agency after taking a Peer Counseling course at a local community college. This job started in 1989. Since then he has also taken other classes at three community colleges in the area.

Messages during the teenage years

Tom grew up living with his mother, father, siblings and grandmother. His mother didn't work outside the home, and in fact appeared to have some symptoms of mental illness. His father was a machinist.

Tom says that a work ethic was always present in the home, not in a spoken way, but it was clearly visible. The structure that work provides was evident as he reflected back on his childhood.

What accounts for your success? Advice for others

A significant aspect of Tom's success has been the lessons he's learned from eastern philosophy – the practice of being in the here and now. He tries to be attentive to the smallest things (scents in the air, the color of the sky) and not take anything for granted.

He also believes in having a positive, "can do" attitude. A quote from his Mental Health Consumer of the Year biographical sketch sums this up: "...each morning he reflects on the positive things in his life and then walks out the door with an attitude that he can make the most of the day ahead of him... As he walks along his path of wellness and recovery, he carries the thought that nothing's going to happen unless you do it. Tom is making his life happen, one day at a time."

Tom also had advice for others:

- You can overcome; you can survive. It'll take a lot of work, and ultimately you are going to have to do it yourself.
- Build good social skills.
- Be assertive in your treatment; be an informed consumer. For example, ask about the side effects of medications.
- Ask about new medications.
- Read a lot.
- Use the supports that are available to you – people, volunteer opportunities, and schools.
- Read about, and talk with, people who have recovered.
- It is important to use all the help or services available, and take an active role in your recovery.

Over the years Tom has played an active role in the self-help movement in the county where he lives, including serving on the board of an organized mental health client group.

Helen

Employment, earnings, and SSA benefit status

Employment

Helen is employed by County Mental Health, through the SES. She is in a job she has had since July 2000. She serves as a Medication Program Assistant with one of the county's Mental Health Centers. Her other position, which she has held since March 2002, is an Information & Referral Specialist with a Community Counseling Center. As a volunteer, Helen also performs occasionally as "Helena the Clown." Sometimes she gets paid.

Earnings

In July 2004, Helen earned \$659. This is her monthly salary. She is paid \$8.24 per hour, and works about 20 hours per week (10 hours at each job). Her monthly income is about \$1,373, made up of \$659 in earnings and \$714 in SSDI. ISSP staff feels that Helen would probably work more if she did not have to deal with the SSDI "cliff," by going over Substantial Gainful Activity (SGA) level. She does not feel at this time that she can work full-time and go off SSDI.

SSA benefit status

Helen, who is 55 years of age, is an SSDI Only beneficiary. Her monthly check is for \$714.

ISSP project enrollment

Helen enrolled in the ISSP project on March 5, 2000. She was a client of the SES when she heard about the ISSP program. A job counselor told her about ISSP and she enrolled, mainly because of the additional support she thought she might get.

Services, supports, and the future

Through the ISSP project, Helen participated in a "Boundaries Class" which focused on maintaining a professional disposition at work. Helen took an anger management class, as well as a class on how to be a good employee. She also learned how to budget and got help qualifying for SSDI. She benefited from job development and job coaching. _____ is her VRS counselor, and he also guided her once she became an ISSP participant.

Helen said that the most helpful ISSP services were wage reporting and "getting organized."

Last year, Helen completed a Peer-to-Peer training sponsored by the National Alliance for the Mentally Ill (NAMI), to become a facilitator for future groups. She was involved in her first group as a trainer this past spring.

Personal history

Onset and work history

Helen has a diverse and lengthy work history prior to her bipolar diagnosis (in 1998, at age of 49). After college (4 years), she volunteered in the Peace Corps, and then held "maybe 35+ jobs" but she had trouble holding them. Since she had an undiagnosed learning disability, she was labeled as

Success Stories and Survey Results

“stupid and slow” by many employers. They also said she had “emotional problems.” Some jobs she held included recreational assistant, ESL teacher in Japan, YMCA program director, teacher in English conversation, dishwasher, and Girl Scout professional. This last one she held for 2 years, the longest she had ever held a job.

When Helen was 37, she was diagnosed with a learning disability. Eight years later she learned she had Attention Deficit Hyperactivity Disorder (ADHD), and at 49 years of age, she was diagnosed with bipolar disorder, unspecified. At that time she was living in a homeless shelter. She had been a nanny for the child of a wealthy mother. When the job ended, she took on another nanny job where she “lived in.” But the child had many problems making the work quite difficult, so she quit. At that point she had no resources (she’d spent all of her earnings paying off debts) and since she didn’t have anywhere to stay, she moved into a girlfriend’s apartment, and then a homeless shelter. Helen says that this point in her life, discovering that she had cancer, was “hitting bottom.”

After the bipolar diagnosis in 1998-99, Helen started taking medications, and within eight months she got a job as a peer counselor with County Mental Health. Then, two years later, she began as an Information & Referral Specialist at one of County Mental Health’s Counseling Centers.

Messages during the teenage years

Helen said that she had “very good parents.” Her father was an engineer, and even though her mother was a homemaker, she was involved in a lot of outside-the-house activities such as the Parent-Teacher Association, square dancing, and Campfire Girls. Helen’s mother was manic-depressive (bipolar) and suicidal. Helen has a brother, seven years older than she is. He is a PhD scientist. Helen looks up to him. Education and work were strongly emphasized as Helen was growing up.

What accounts for your success? Advice for others

Helen said that the things that helped her be successful are medications, therapy, and having a good support team that believed in her. She points to _____ as a valuable vocational counselor and ISSP benefits counselor!

And while Helen believes that some of her friends with psychiatric disabilities were helpful, it was important to have some non-disabled friends as well.

Helen was diagnosed with cancer 5 years ago, and has been “cured” for 4 years. Her will to fight cancer says a lot about her. She appears to be a survivor in every sense of the word, be it in her struggle with cancer, homelessness, or keeping a job. She volunteers every year for the American Cancer Society’s Relay for Life in Redwood City, as a clown and does games to raise money and awareness for prevention of cancer.

When asked why she’s successful holding down jobs now (as opposed to before her diagnosis and medications), she answers, “I have a lot of support people now and strong faith!”

Anthony

Employment, earnings, and SSA benefit status

Employment

Anthony has two jobs. He works for County Social Services. And, he works on-call for a crisis residential program in the same county.

Earnings

In July 2004, Anthony earned \$3,171. (July involved three pay checks rather than the usual two.) On Anthony's county job, he earns about \$22 per hour. The crisis residential program pays him about \$12 per hour.

SSA benefit status

Anthony, who is 24 years of age, is an SSI Only recipient. When he entered the project as a 19 year old, he was also receiving SSDI on his father's record. SSDI was suspended in August 2001, because Anthony's earnings were above the Substantial Gainful Activity (SGA) level.

ISSP project enrollment

Anthony enrolled in the ISSP project on December 1, 1999. Anthony was participating in a disabled students program at a local community college when he heard a presentation by SES staff about the ISSP project.

Services, supports, and the future

ISSP staff helped Anthony get the \$3 for \$4 waiver. They also helped him with wage reporting, overpayments ("a lot of times!") and record keeping. The staff provided a lot of encouragement, urging him to continue with school and to balance work/life issues. The "can do" attitude they imparted really helped, Anthony said. Anthony also opened an Independence Account and has saved about \$15,000.00, which he plans to use for graduate school. He also utilized the Student Earned Income Exclusion until he reached age 22.

While in the project, Anthony completed his Human Services Certificate and AA degree at a local community college. He then transferred to a State University and will soon be completing his BA in Psychology. During this time he has also regularly worked while going to school. When he has changed jobs, he has generally found new positions on his own, seeking support from ISSP staff as needed.

Personal history

Onset and work history

There was a lot of domestic violence in the home when Anthony was growing up. He recalls "a lot of police contact." Anthony first experienced mental illness at 15 years of age. He told a doctor that he had a sleep disorder, which led to a referral to a County Mental Health clinic. Since his family was covered by Kaiser, he also got treatment from that Health Maintenance Organization. His first hospitalization was at 16 years of age.

Success Stories and Survey Results

Prior to his hospitalization, Anthony was an active teenager. He was involved in various committees and community organization. He was a volunteer mentor starting at 11 years of age, and when he was 15, he began volunteering as an AIDS educator in high school. (Later he also did this for the County's AIDS Program.). His first paid job was as a health advocate at a county teen clinic. At 16, he was a recreation aide at a skilled nursing facility.⁴

Anthony says he was hospitalized a lot in high school, and at one point was expelled and sent to a therapeutic day school. He said "they failed me because they didn't value my academic skills."

Messages during the teenage years

Anthony's mother was an absent caretaker, who worked as a secretary and environmental planner. From the ages of 5 to 7, babysitters raised Anthony, and at 7 his grandmother took over. Anthony says he was forced to grow up quickly. By 11, for example, he had to learn how to budget his allowance.

Anthony's father was in the military, but left the home (divorced Anthony's mother) when Anthony was 5. His father abused his mother, who in turn abused Anthony.

When asked if there was a work ethic that emanated from his family, Anthony said "Yes, but it was over the top. Good enough wasn't. An A-minus in school was a problem. And I was supposed to have decided on a career by the time I was 7 or 8."

What accounts for your success? Advice for others

Anthony had some advice for his peers: "Dream; then fulfill those dreams."

He also had advice for Mental Health staff:

- Encourage them; be real but don't squelch their dreams.
- Don't encourage reliance on the system.
- Don't focus so much on the outcome, but instead focus on the process.

And some advice for Mental Health administrators:

- Programs like the ISSP need to continue; prevention programs are important.
- A holistic approach is important –focus less on the outcome and more on the process.

⁴ Anthony said that he is good with difficult clients, as the following story attests. He was assigned a client with severe obsessive-compulsive disorder. Many other staff had given up on this man. His OCD was so bad that he could barely leave his apartment. When he did, it took 30 minutes just to step outside. Anthony worked slowly and persistently with this man, listening to him, encouraging him, and suggesting he take small steps. The first step was, after leaving the apartment, to just go across the street to the coffee shop. That was enough. Then he gradually took him a little farther, then a little farther. Eventually they were able to go to San Francisco together. The man also had some severe substance abuse problems, for which Anthony used a "tough love" approach. After their relationship was well established, Anthony had the man agree to a daily informal contract: "if you use, I won't be coming over to visit." Under Anthony's care, this man stayed out of the hospital for 3 years, which was a record for him. Eventually he even got a job, which he's held for several years.

April

Employment, earnings, and SSA benefit status

Employment

April works as a Courtesy Clerk at a large grocery store.

Earnings

In July 2004, April earned \$759. She typically earns \$500 to \$600 per month.

SSA benefit status

April, who is 42 years of age, is an SSDI Only beneficiary. For July, her SSDI check was \$765.

ISSP project enrollment

April enrolled in the ISSP project on January 26, 1999. She said she was glad she started the program because "I just like it." Previously she had been in a sheltered workshop doing assembly work, which she really didn't enjoy. According to ISSP staff, the sheltered workshop was a bad match. Her attendance was low, as was her productivity. In fact because of this, the sheltered workshop staff felt she wasn't ready for competitive employment. ISSP staff kept saying that she wanted a different job and should be able to try one.

Services, supports, and the future

April said that that the class she took on how to interview for a job was very helpful. A job developer eventually got her a job at a specialty retail store, but two years ago she got her present job at the grocery store on her own. A local non-profit agency's employment service helped April with job coaching.

After April started working as a Courtesy Clerk, she complained of fatigue as the parking lot is uphill in places and it was hard pushing the carts up these various "slopes." She had apparently used up all of her DOR-sponsored job coaching hours. Yet, she clearly needed support. She did not sound happy about her job and it didn't sound like the grocery store was too happy to have her. Her ISSP counselor, an SC, had concerns that she was at risk of losing her job. April hadn't been at the job a long time and staff also had concerns that she would lose her motivation to work. Therefore, the SC met her at her job, spoke with the manager, and found that though they "liked" April, she was not "meeting expectations." According to the manager, she was not always showing up for her shifts, would show up late, etc. April said it was because she was so tired. She also said that she was being asked to work extra hours and "couldn't say no" to them, even if it put her over SGA to work these extra hours. The SC was able to address this with the manager. The SC also reported back to April's case manager and former job coach at the non-profit's jobs program. They then intervened and were able to arrange a transfer to another grocery store in the chain closer to April's residence. More job coaching hours were also approved, since April was going to a new site with potentially new assigned tasks. The change made a world of difference! April has reported being happy there ever since. The store is small, the parking lot is flat, and she loves being so close to home. Once her job coaching hours ran out again, the SC asked April if she wanted continued support on the job. April reported back that she was okay without it and was really enjoying her job

Personal history

Onset and work history

At first, April couldn't recall when she first experienced mental illness, then it came to her that it was in January 1996, when she was 34 years old. Prior to that she held some jobs, which she had gotten on her own. These included 1) working for a veterinarian (kennel help), and 2) an airline company (loading baggage onto ramps, backing out planes). Before these jobs April had been in the United States Navy.

April couldn't recall her first job after she began her recovery from mental illness. But according to ISSP staff she tried a job as a stock clerk in October 1997, which only lasted a few days. She also tried out temp agency, but that didn't work out. April came to the sheltered workshop in February 1998. She tried several jobs at the sheltered workshop before being transferred to the ISSP project. She tried a few jobs (e.g., assembly, folding/gluing packages, filing), but these didn't last long. The work was demanding (e.g., too fast, too physical). Her first successful job with the ISSP project was at the specialty retail store, which she held for nine months, from March through December 2001. Here she cared for small animals, cleaned cages, stocked shelves and helped customers.

On her own, April found a job at a grocery store, which she started in December 2001. She started at the store in _____, but then, again on her own, transferred to the store in _____ to be closer to her home. At the grocery store she bags groceries and loads them in cars. She also does some basic janitorial tasks, such as cleaning up when a customer drops a food item on the floor.

Messages during the teenage years

April's father left the family in 1964. He was a merchant marine.

Growing up, April lived with her mother and stepfather. Her mother didn't work outside of the home, but her stepfather was in the Navy, so the family traveled a lot. She recalls living on the East and West coasts, as well as in Japan. She finished high school in Rhode Island.

April reports that her parents didn't teach her the value of work. It was something she just picked up on her own. When asked why she works, she said "I've got to pay the bills; and it's something to do."

What accounts for your success? Advice for others

According to ISSP staff, April is "fiercely independent" and that accounts for her strong desire to work. April didn't have any advice for others.

Cheryl

Employment, earnings, and SSA benefit status

Employment

Cheryl took a filing job with County Mental Health in May 2000. She is still in that position.

Earnings

In July 2004, Cheryl earned \$305. She is paid \$7.00 per hour. Cheryl typically works about 14 hours per week, the equivalent of about 60 hours per month.

SSA benefit status

Cheryl, who is 49 years of age, is a Concurrent beneficiary. She became eligible for SSDI last year. Her monthly SSDI check is \$162.

ISSP project enrollment

Cheryl enrolled in the ISSP project on May 31, 2000. Cheryl has been with the SES since 1988. She worked at the sheltered workshop for six and one-half years (1988-94), when she got a job as a Peer Counselor with _____ Mental Health _____. Someone (probably an early BC) informed Cheryl about the ISSP project. Cheryl was attracted by the extra money associated with the SSI waivers.

Services, supports, and the future

There hasn't been much participation by Cheryl in the ISSP project. "They call about once a year," Cheryl said. ISSP staff feels that Cheryl may be making a distinction between SES and ISSP staff. According to them, Cheryl is called at least once per quarter. She also took part in an SC's Boundaries class for awhile, and ISSP staff helped her get SSI payments straightened out. Asked specifically about pay stubs, Cheryl said that SES automatically sends them in to SSA once a month. Cheryl's filing job with Central County Mental Health is thought of as "transitional," although several SES clients have been at "transitional jobs" for over a year. Asked what has helped the most, Cheryl mentioned (1) automatic reporting of wages and (2) the extra dollars attributable to the \$3 for \$4 waiver.

Asked what she would be doing when the SSI waivers end, Cheryl said that she would lose the extra dollars. She said that she is in the process of getting another job and that it may pay a little more. It would be another employer, precisely whom she doesn't know. She mentioned the need to take a computer class through the Regional Occupational Program (ROP), to do computerized office work.

Personal history

Onset and work history

Cheryl's first hospitalization was at age 22. She remembers getting depressed and struggling with insomnia at age 15. She was suicidal. Cheryl did not work while in high school. In her first year of college, she worked in a Language Laboratory, getting language tapes for students. After that, she tried waitressing, but it didn't work out. She started receiving SSI when she was 23 or 24.

Cheryl did some office work until her second psychiatric break at age 31 (about 1985). It was "too

Success Stories and Survey Results

stressful.” From that time forward, Cheryl worked in a grocery store for a while, and then was at the old sheltered workshop, on Elaine Street in _____. After six and one-half years at the sheltered workshop, Cheryl was a cashier at a community-based organization, before her job as a Peer Counselor for the Mental Health Association.

Messages during the teenage years

From ages 13 to 15, Cheryl lived with her mother and one sister. Another sister and one brother lived elsewhere. Cheryl, her mother, and sister moved from Wisconsin to Saskatoon, Saskatchewan. There, Cheryl's mother worked at getting her PhD in Spanish. After graduation, her mother got a job as a Professor at a Canadian University, where she worked for 30 years. Cheryl said that her mother wanted her to go to college and get a good job. When Cheryl got very depressed at age 15, and was suicidal, she got help.

What accounts for your success? Advice for others

Cheryl said that she is “pretty happy” now. She said that she is stable, and can sleep and has energy to go to work, although the medications she is taking make her somewhat sleepy. She attributes her success to:

- Having goals and being disciplined in achieving them. – the SES helped with a lot of counseling. Cheryl attended a local community college for six years to get a Human Service Certificate to do peer counseling. (Cheryl also took English classes.)
- Getting a job and staying with it. – This gave her a “sense of accomplishment.”
- Recovery. – Cheryl says that she always wanted to be well. And, she believes that getting well will come about if one does things. “The real test of recovery would be not needing SSI,” she said. But, she is uncertain whether this will be achieved. Cheryl said that she is not sure whether she can handle the stress of a full-time job.

Cheryl has indicated that she has a strong faith-based foundation to draw from. God and her spirituality appear as a high priority in her life.

Ken

Employment, earnings, and SSA benefit status

Employment

Ken works as a security guard at a train station in a near-by city. At the interview, he announced that he had given his company two weeks notice, and would be leaving soon. He said he is “tired of the job,” and doesn’t like the confrontation with people who come around the station at night.

Earnings

In July 2004, Ken earned \$2,122. He is paid \$12.34 per hour for full-time work. The last few months, Ken has worked full-time on the graveyard shift (10 pm to 6 am), earning about \$2,500 per month.

SSA benefit status

Ken, who is 44 years old, is an SSI Only recipient.

ISSP project enrollment

Ken recalls that the following were factors in signing up for the ISSP project: (1) being interested in the research (“I’m a good study person”); and (2) having help with benefits and possible waivers (\$3 for \$4). Ken is not sure whom he talked to about the ISSP project. It was one of the SCs or BCs at the time.

Services, supports, and the future

Three services have been most important:

1. *Dealing with SSA.* – Help in reporting earnings to SSA. Ken said that two times, he got bonus checks, which temporarily increased his earnings. ISSP staff know the “in’s and out’s” of SSA benefits. When trouble emerges, ISSP staff can help. Some staff at SSA give very short answers. ISSP staff is able to explain things.
2. *Job development.* – _____, a job developer, helped Ken get to security job. Ken had no car, so needed taxi vouchers, which his BC helped him obtain. He also got help in obtaining his uniform and badge. (This time, Ken did not need job coaching. He called his counselor or ISSP staff once, to get help with a shift change. One time, on a janitorial crew, Ken used a job coach for suggestions.)
3. The SC provides ideas and suggestions.

Ken has a lot of money withheld for IRS. Each month (or, each pay period), he has about \$600 withheld for IRS, and takes home about \$600. He would like to see SSA be able to hold back some dollars in an Independence Account, and give those dollars to the recipient every 3 or 4 months. This would encourage good spending habits, he said. Right now, there is constant pressure to spend. There should be time to plan, and to find better deals.

Ken said the end of the waivers is not a factor in his decision to leave his present job. He is tired of it (the hassle), and plans to take a lower paying job for a while. Ken said that his goal is to be completely off of SSI. He may be able to find a good-paying job (\$14 per hour) at a cabinet shop. His name is on the list at the U.S. Postal Service (having taken the test), and he hopes he gets called. There he would make about \$3,000 per month.

Personal history

Onset and work history

When Ken was six and one-half years old, his parents split up. Ken lived with his mother. He recalls doing a lot of chores around the house (mowing the lawn, gardening). When 15 or 16, Ken worked at a lumberyard back East, when living temporarily with his father.

Living in a nearby town, Ken “faded out of school.” He was withdrawn and spent a lot of time sitting around. He procrastinated a lot. In 1983, Ken was 22-23 years old. At that time, he was diagnosed having Paranoid Schizophrenia. He was “out of home” and “out of work.” He feels that homelessness was the trigger for his illness. There was a community image issue (acting out), involving the Police Department. He remembers being “shut out” of restaurants. Ken began taking medications, such as DOPAMINE and HALDOL. (Now he takes 5 milligrams of XYPREXA every day, and sees his doctor every three months. XYPREXA is “smooth” and makes him feel “comfortable.”)

Shortly after being diagnosed with a mental illness, Ken did some work at the sheltered workshop. Then, in 1985-88, he attended a junior college. This increased his contact with people and helped in establishing some life goals (life planning). For about a year, he moved back into his mother’s house. In 1988, Ken joined the Army. He was stationed at Fort Sill, Oklahoma. He found it hard to sleep. He experienced a lot of fatigue and depression. He did not adapt well. He was “kicked out” of the service (medical discharge).

In 1989, he began receiving SSI, and also qualified for Section 8 rental assistance. He lived in an apartment in a nearby town. In 1991, he moved to a near-by city. There, he started a gardening business, and used a truck for hauling. He was struggling again in 1997 and started living out of his camper. Due to his homelessness and apparent paranoid thoughts, his mother intervened and sought a mental health evaluation for him. This evaluation resulted in a stay at a Mental Health Center and outpatient suites for one and one-half years. From that point on, Ken had a number of jobs, including one at a theater, a large hardware store, a bike shop, a security company, and the County General Hospital. For the last two years, Ken has lived independently in his own apartment. He has had the security job at the train station for the past 12 months.

Messages during the teenage years

Ken lived with his mother and one brother and one sister in the near-by town. His mother did not remarry. The kids saw their father in the summer, back in the Midwest. Both siblings were successful in school. Both graduated from college. One is a teacher. Ken’s mother worked at a liquor store and for a used products store. Ken’s father worked in a hardware store and as a traveling salesman. Ken sensed a strong work ethic. He learned that work makes one proud, and that money makes it possible to have the things one wants.

What accounts for your success? Advice for others

Ken made several points:

- *Knowing what work means in terms of values.* – Whether full- or part-time, work can affect how others see you, can bring extra dollars to spend, and can affect comfort level.
- *One needs to know oneself, and what one wants from work.* – Everyone is different. If a person works more, there will be fewer hours to relax and do other things. Or, a person may get fatigued and see problems amplified. Hours are the key.
- *Employers get a bonus when they hire someone with a disability.* – It makes sense to start part-time, and then increase hours if one remains comfortable.
- *When not working, a person should find things to balance one’s life.* – Do things that one

Success Stories and Survey Results

enjoys. Try new things. Ken spends time bicycling, using his computer, watching television, going to free concerts, and reading newspapers and magazines.

- Ken has also learned the importance of being friendly and “bending a little bit.” Doing these things will increase cooperation. One needs to be respectful of others. Learning these social skills helped Ken at the bike shop. When verbal battles escalate, one can get into physical fights. Communication first; fighting last is something Ken tries to live by.

James

Employment, earnings, and SSA benefit status

Employment

James is employed as a Courtesy Clerk at a grocery store. He has been with the company since December 2000. For the first couple of years, he worked part-time. Since then, he has worked full-time, with full benefits. At the beginning, James got two weeks paid vacation per year. Now, he gets three weeks. Vacations are very important to James, as will be seen shortly.

Earnings

In July 2004, James earned \$1,983. He is paid \$8.40 per hour. He works 40 or more hours a week. His paycheck was larger in July than most months, because he is paid weekly and July had five (rather than the usual four) Fridays.

SSA benefit status

James, who is 44 years of age, is an SSI Only recipient.

ISSP project enrollment

James enrolled in the ISSP project on July 6, 1999. James was approached by a BC, who suggested that he participate.

Services, supports, and the future

James mentioned a variety of things that the SES and the ISSP project have done for him. ISSP staff, other SES staff, and DOR have helped in the following ways:

- A SES or ISSP staff member went with James to a union meetings in a near-by big city. James was trying to get on full-time with grocery chain, so as to have full benefits.
- James mails pay stubs monthly to the SC, so that they can be submitted to SSA by the 10th of the following month.
- James has had help (a BC and another person) applying for Renter's Rebate and the Earned Income Tax Credit.
- Vouchers for clothes. (James added that for each new job, he signed up with DOR.)
- Halloween and other parties.
- Second Harvest for free food.

James said, "they are always there to help me. Their presence alone is cool."

Personal history

James's first job was as a paperboy. He dropped out of high school while in the 10th grade. That is when he tried *speed* for the first time. After leaving high school, he had jobs as a bus boy and janitor. He worked at ice cream store for a time. In 1979, he entered the California Conservation Corps. He was assigned to the _____ camp (in _____) and, later, _____.

In 1983, he experienced his first bout of mental illness. In jail, he burned himself with cigarettes. He was

Success Stories and Survey Results

taken to the General Hospital. From there he went to a psychiatric facility until 1986. From there he went to board and care and day treatment. He had a relapse in the late 1980s, went to the psychiatric facility again, and got on SSI. Through Mental Health, he got a job doing janitorial work in the neighborhood in _____. He also worked as a dishwasher. James says that he has been "clean and sober" for the last fifteen years.

In 1991-92, James moved to a non-profit agency. He did kitchen work at the SES. And, through the SES, he had jobs at a cafe (janitorial work) and at the General Hospital. He lived near the race track. At least seven or eight years ago, James got a job at a restaurant, as a busboy. He worked there for two or three years, making a lot of money, with good hours. there was a change in management at the restaurant and the new manager was real rough on James, according to ISSP staff who knew James at the time. Nothing James did seemed to be "good enough." After giving him some coaching, talking with the manager, etc., it seemed best that James leave. That was the BC's and SC's judgment. James said that he made some mistakes, and returned to the sheltered workshop kitchen. _____, the SES job developer, helped him get on with the grocery store.

What accounts for your success? Advice for others

Every morning, James is "happy to be up and about, even though tired." He attributes some of his success to luck. Vacations serve as a motivator. When he got a \$3,500 back payment, he started an Independence Account. He used this money for a vacation in New York. Since that time, he has saved about \$3,000 each time for vacations at Lake Tahoe, Hawaii, Florida, and Las Vegas. James mentioned getting a lot of support at work, and through the non-profit agency. This human services agency helped get him into a special housing program with the Housing Authority. James has been living alone, in his own cottage now, for a couple of years.

Billy

Employment, earnings, and SSA benefit status

Employment

Billy has two or three jobs. He works for a company in a near-by town, doing assembly and packaging work, with the help of a job coach. This job started in July 2003. Hours for this job fluctuate a good deal. Since October 2003, he has worked one day a week (8 hours) on a County Hospital crew organized through the SES. Billy may also be doing some janitorial work for a local company.

Earnings

In July 2004, Billy earned about \$500. He was paid \$7.50 per hour at his two principal jobs, and at an unknown rate at the third job. He earns (gross wages) about \$500 per month.

SSA benefit status

Billy, who is 33 years of age, is an SSDI Only beneficiary. His monthly SSDI check is about \$900.

ISSP project enrollment

Billy enrolled in the ISSP project on July 26, 1999. Billy said that his current counselor brought up the project idea. (Because that person did not return to VRS until August 2000, ISSP staff believes that another BC brought up the idea. The current BC indicates that Billy was already in the project when he returned to the SES.) Billy said that they were (1) looking for volunteers; (2) something was said about "benefits;" and (3) the research angle (helping others) was a factor in his signing up for ISSP services.

Services, supports, and the future

Billy has been a SES client for 10 years or more. He has returned to the SES and the sheltered workshop whenever things did not work out. Billy has had a variety of jobs, but has been laid off from time to time. Some businesses went out of business. When that happened, Billy would return to the SES for services. He would work at the sheltered workshop, and get help with job placement and job coaching.

_____ has been Billy's counselor at the SES for 10 years, except for a period of a year or two when he (the counselor) was not employed by the SES. Over the years, Billy said that the most helpful services have been:

- *Job coaching.* – Job coaching has been very helpful to Billy. When he starts a new job, Billy indicated that the coach would be there all day. Then, one time per week, fading to one time per month. People come by to check on work (hygiene, job requirements, etc.). They teach job skills, and make sure Billy is prepared to work. This service has been *individualized*, even when two or more people are working in close proximity.
- *Resume.* – Joe has helped Billy to construct a good resume.
- *Job interviewing class.* – Billy took a One-Stop Career Center generic interviewing class that focused on being on time, and participating in interviews. There was video feedback. The class was "very helpful."
- *Job search and job finding.* – Billy has used the job search services of the One-Stop Career Center. He gets help finding work. Someone will call Billy to alert him to a job possibility

Success Stories and Survey Results

when he is out-of-work.

Billy returned to a local community college in the Summer of 2002. ISSP hooked him up with the Supported Education program at the College. He is studying the Humanities and is very excited about being back in school. ISSP staff has been exploring career ideas. He would like to get involved in Social Science research, “working on polls, surveys, etc.”

Personal history

Onset and work history

Billy suffered a concussion when he was 11 years of age. After that, time would move too slowly or too fast. When he was 16 or 17, he experienced a mental illness. He had memory lapses, and had trouble distinguishing dream states and reality. “The dream pattern reoccurs, but is less now.”

When in high school, Billy did some construction work, but had to give it up to concentrate on his studies. He graduated from high school, and on a partial scholarship attended a four-year, private business college, but left after a couple of weeks. He attended a local community college for a while, taking English and mathematics, but had problems with the latter.

Billy has had a series of jobs over the last 10 years, some through SES, some temporary. He has worked at the sheltered workshop from time to time. For a time, he was an Alcohol Counselor and a Peer Counselor at County Mental Health, where he worked in a meeting room/activity center. He did packaging work in a near-by city. He worked for Corporation (assembly, packaging), at a laser cartridge factory, at _____, and is now at _____, a company in a near-by town where Billy does packaging work.⁵ Billy may also be doing janitorial work for a company in another town near where he lives.

Messages during the teenage years

Billy and three siblings lived with his father, when Billy was a teenager. Billy’s father worked as a union carpenter. Billy learned about tools and the importance of being prompt and always ready to work. He used some work skills around the house (e.g., building cages). Billy’s father provided a “working atmosphere.” There were union meetings on weekends, some at home, and a lot of talk about carpentry and being organized. Billy’s father always emphasized that “once you have any job, it is the *best* job.”

What accounts for your success? Advice for others

Billy attributes his success to how he has handled his mental illness. He said that “knowing how I am seen” has been important. He tries to be very social with employers, and orderly, and punctual. He focuses on learning the employer’s expectations. He has seen some people who have been unaware of their mental illness. When they lost a job, they were unaware why. Some are so sick that they are unaware of most everything.

⁵ Billy has had some bad luck with companies closing down or moving out of the area. He worked at the Laser Factory from 1996 to 2001, a job developed by the SES. He was at _____ from May 2002 to July 2003. That job was also developed through the SES. The positive side is that when these situations occurred he would get back in contact with the SES and staff have been able to help him find another position.

Derek

Employment, earnings, and SSA benefit status

Employment

Derek is employed by a security company at a near-by airport. He protects a section of the airport, using monitors and computer entry. He checks employees of several airlines, to be sure they have permission to enter his area. This is a "good job," with lots of responsibility, Derek said. Compared with a video rental store, his most recent job, the security job is not as stressful and pays better. Derek has been with the security company since February 10, 2004. He is proud of the fact that he has not missed one day of work.

Earnings

In July 2004, Derek earned \$2,061. This was more than usual, because July had three (rather than two) paydays. Derek earns \$10.76 per hour, and worked 138 hours in July. Derek currently works 32 hours a week, and hopes to go to 40 hours.

SSA benefit status

Derek, who is 44 years of age, is an SSI Only recipient.

ISSP project enrollment

Derek enrolled in the ISSP project on March 25, 1999. Derek recalls learning about the project through _____ and a SC.

Services, supports, and the future

ISSP staff helped when Derek got the security job. They helped with a background check (Live Scan), and got him reimbursed \$100 for a special security card. (DOR helped him obtain his security card.)

When he left a job at the video rental store, Derek talked with SES job developers. He said he was interested in security work. The job developers arranged an interview with the security company. He was at the video rental store from December 2000 to December 2003.

Derek said that the \$3 for \$4 waiver helped him pay his rent. The BC helped greatly. He helped Derek understand the \$3 for \$4, and explained about problems with timely wage inputting. "[The BC] is a great humanitarian; always kindly; excellent worker." The BC reports that Derek stays in regular contact by phone, often 2 to 3 times a week. This kind of support seems helpful as he continues his recovery, the BC noted.

The SC has been like a therapist. "She helped with self-esteem, charisma, and the like. She gave me booklets about coping with depression."

Personal history

Onset and work history

Derek attended a Catholic school. At age 19, when attending a State University, he had a nervous

Success Stories and Survey Results

breakdown. He hung around with a bad crowd, and did drugs. Derek was seeing a psychiatrist, and taking medications, when he enlisted in the Armed Forces. His condition was aggravated, and the Armed Forces branch learned that he had been seeing a psychiatrist and taking psychotropic medications. Derek got an honorable discharge. It was explained to Derek that one can not be in the military service while taking psychotropic medications.

Derek said that he has a case against the military, apparently the claim is a “service-connected disability,” or at least aggravation of his condition upon entering the service. A Dr. _____ has sent a letter to the Armed Forces branch, trying to get retroactive compensation to July 2001. If successful, Derek would get a lump sum of \$98,000 and over \$2,000 a month for life.

Before depression hit, shortly before coming to SES and working in the sheltered workshop (age 37), Derek worked for about five years in a graphics company, not as a person with a disability. Derek started at the sheltered workshop in 1997. He was soon promoted to office work, at minimum wage. After that, Derek worked part-time at County Mental Health in a nearby city. There, he did office work – charting, filing, etc.

After that, he got a job at the video rental store. That job didn’t work out. Derek said that after learning to use the computer, Derek found the work too stressful when there were a lot of customers in line. Derek told ISSP staff that he left the job because his hours were drastically reduced and he wasn’t given enough opportunity to work at the computer and cash register. He was also frustrated watching new employees coming on-board at a higher rate of pay than he was being paid after three years of service. He apparently only saw a pay raise of \$0.20 per hour, in the time he worked there. He also had an ankle injury, and used State Disability Insurance (SDI) for a while.

Messages during the teenage years

Derek grew up with parents, brothers and sisters. Work was emphasized. Parents wanted the kids to be successful at school. Father was a CPA. All were “hard workers.”

What accounts for your success? Advice for others

“Don’t be hard on yourself. Don’t feel fearful, anxious, or guilty. This will help you avoid getting paranoid.”

Derek gave his brother advice when he came to the sheltered workshop. His brother was violent, and went to jail. Derek’s brother got counseling, a job, and his own place. He is not violent anymore. Derek’s brother receives SSI.

Diane

Employment, earnings, and SSA benefit status

Employment

Diane works in the fitting room at a department store, up to 20 hours a week.

Earnings

In July 2004, Diane earned \$133. She is paid \$7.40 per hour. She worked 18 hours last month.

SSA benefit status

Diane, who is 58 years old, is an SSDI Only beneficiary. For July, her SSDI check was \$663.

ISSP project enrollment

Diane enrolled in the ISSP project on September 1, 1999. Diane experienced a nervous breakdown in 1988, when she was in her early 40s. Sometime after that, she came to the SES, which “helped immensely.” Diane was in the sheltered workshop, when she learned of the ISSP project. She got information from her counselor, and through flyers and word-of-mouth.

Services, supports, and the future

Diane could not do the work she was doing when her psychiatric disability became severe in 1988. SES staff helped Diane, by providing classes on resumes, interviewing, and the like. Role-playing was involved. The instructors were _____, _____, and _____. _____, the head job developer, sat in on interviews. _____ learned and understood, Diane said. The instructors “put themselves in our place.” The job developer’s message was: “You can do it.”

Diane said that times have changed, and that it is now harder to get a job. She is glad she stuck with the program. When she first came to SES and the sheltered workshop, people would ask: “How are you?” Her automatic reply was: “Fine.” But, she learned from more sensitive co-workers, who were apparently more in touch with their feelings. Some co-workers would reply with: “No, you’re not” and would offer Diane a hug. These exchanges helped Diane to get in touch with her own feelings and then share more of her true self with others.

Personal history

Onset and work history

Diane had her first job when she was 17 or 18 years old. She was fearful, but was taught to do the job. Diane discovered that she was “not really dumb.” From that time until she was nearly 40 years of age, Diane had a number of jobs in advertising and mailrooms. Finally, she lost her job. She felt “depressed, worthless.” A doctor diagnosed her condition. Shortly thereafter, she came to the SES, where she developed a lot of confidence. She learned a lot of things, including working with bolts, microfiche, and the like. Besides the sheltered workshop, in recent years she has worked mostly in retail. Initially, she worked for a discount department store; then, another company. And, now, she works at an up-scale department store. Before she wasn’t sure of herself, but now she is.

Messages during the teenage years

Diane lived with two aunts, separately, when a child. Diane's mother sent her to live with one aunt, in Nevada, when she was 2 years old. Diane endured substantial emotional and physical abuse, while living there. Apparently due to the trauma, she found it hard to concentrate at school. She would "freeze-up," finding it difficult to think, let alone, learn. She couldn't read or write, and thought she might be dumb. She wanted to sleep a lot. As a teenager, she was sent to her other aunt's, who lived in California, for vacations. When she went to live there, she found that she could be interested in her studies and learning. Feeling safer in this environment, she was able to concentrate and she learned how to read and write. One aunt worked in a laundry. "Work was a pattern in my family." Diane's uncle worked all his life. They set a good example.

What accounts for your success? Advice for others

Diane offered the following advice to individuals facing some of the same issues:

- If coming to the sheltered workshop, give it a try.
- Think positively when things are not going well.
- "Rely on the Lord!"
- Always remember: some people are worse off than you are.

Allen

Employment, earnings, and SSA benefit status

Employment

Allen is employed by the County. He is one of two Service Coordinators on the Individual Self-Sufficiency Planning (ISSP) project.

Earnings

In August 2004, Allen earned \$4,250. He works 40 hours a week, and earns \$24.70 per hour, with full benefits.

SSA benefit status

Allen, who is 55 years of age, was an SSI Only recipient, but went off of SSA benefits several months ago.

ISSP project enrollment

Allen enrolled in the ISSP project on September 13, 1999. Allen read about the ISSP project in a local National Alliance for the Mentally Ill (NAMI) Chapter newsletter, and thought it could help him move ahead in terms of housing and work and earnings.

Services, supports, and the future

The following services have been helpful:

- Help with housing through a local non-profit agency. – Allen stayed at The Mental Health Association's Shelter for a month, the non-profit's transitional housing for four months, and then got Shelter Plus services from the non-profit.
- Greater understanding of public benefits (one of the original BCs).
- Got furniture for \$25 from Second Chance, a warehouse in nearby town.
- Got clothes through Minor Miracles.
- Several jobs, including being a Benefits Technician to meet six month requirement to be a peer counselor.
- Several workshops, including Weight Watchers and WRAP. – The other SC did a great job and these were very helpful.
- General counseling.

When Major Depression struck, Allen didn't want to tell anyone. Some denial. He got up the courage to tell a friend, who was understanding. He read a review of Kathy Cronkite's book, *Journey Through Darkness*, which helped him realize that he had major depression. When the bank foreclosed on his house (March 1996), he lived with friends in the town where he lived. They were understanding and supportive.

Over the past four years, Allen has been rebuilding his life. He married a woman he met in classes at a community college. They have their own home, and a rental unit (duplex). They plan to travel to Europe and the East Coast.

Allen is making a career change from accounting to human services. He plans to get a Certified

Success Stories and Survey Results

Psychiatric Rehabilitation Practitioner (CPRP) certificate, and then a PhD. The CPRP credential is something that Allen learned about recently at a California Association of Social Rehabilitation Agencies (CASRA) Convention. Besides educational and intern requirements, both require passing a competency examination. Allen's wife is enrolled in a Drug and Alcohol Counseling program through UC-Berkeley's Extension Division.

Personal history

Onset and work history

Allen feels that he has suffered from one kind of depression or another most of his life. When he was eight or nine years old, he got a paper route. While attending a community college and the University of California, Allen worked in food service at a General Hospital. Allen got his Bachelor's degree in Psychology from the University of California, and a Master's degree in Business Administration from another University. Allen worked for a local accounting firm to get his Certified Public Accountant (CPA) credential and then worked in private industry as a supervisor, manager, or controller for several years. In 1988, Allen started his own CPA firm with an office near Pier 39 in San Francisco.

Allen's father had three nervous breakdowns, including one when Allen was in junior high school. His father wound up in a psychiatric facility. His father also had drinking and personality problems. Allen's paternal grandmother had psychiatric problems. She died when Allen was four years of age.

Major depressive disorder struck in 1993. Allen was mad about not being able to work. He lived in a nearby town, and had a lot of support from friends. He was a member (and President) of a major Service Club. He served on an Economic Development Commission, and was a member (and President) of the Resource Center Advisory Board. He was kicked off the Service Club's rolls for non-attendance.

Allen was in and out of the hospital several times, and had mental health treatment (counseling and antidepressants) through County Mental Health. Eight different drugs were tried, including ZOLOFT, which had some bad side effects. (Allen contends with high blood pressure and diabetes.) Allen worked on and off throughout the entire course of the depression. He was picked up four times by police and involuntarily committed under Health and Welfare Code 5150. He lost his long-term girlfriend, his home, his car, and his business. He had to declare bankruptcy. (He did not lose his CPA credential.)

Recovery began with electroshock treatments in 1998. By this time, Allen was receiving SSI benefits. About that time, Allen came to the SES. Both the Department of Rehabilitation (DOR) and the SES closed out his case, when he was successful as a dispatcher for a trucking firm. But then, he experienced a relapse, and had additional electroshock treatments. Since returning to the SES (and the ISSP project) in September 1999, Allen has had several jobs, including being a Benefits Technician (10 hours per week), working as a Rehabilitation Technician (20 hours per week), being an Office Assistant (March 2001 to January 2002), and Community Worker II (special projects; greeting people coming into the One-Stop Career Center). By the middle of 2000, Allen was well again. Since that time, he has been cured of major depressive disorder. He continues to suffer from Dysthymia, a low-grade depression that he has suffered from all his life.

On February 17, 2002, Allen was offered (and accepted) the grant-funded position of Service Coordinator for the ISSP project. This position carries full benefits, including health coverage. SSI cash benefits disappeared. Since Allen makes well above \$26,000 per year, 1619b also went away.

Messages during the teenage years

Allen was born in Billings, Montana, but spent most of his childhood with his mother and father in a small town in a North Bay county. Allen's mother was a homemaker, paid occasionally for

Success Stories and Survey Results

fundraising. His father devoted most of his work life to music education, making violins and doing repairs. Growing up, education was important. Allen was expected to go to college, which he did. There was always a strong work ethic.

What accounts for your success? Advice for others

Allen offered the following advice:

- Keep the faith. There is a strong possibility that you can get better. “Mental illness is not a life sentence, and can be overcome or at least tamed.”
- Maintain hope, to avoid destructive tendencies.
- “Mental illness is not for wimps! Keep your self-respect.”
- Get help from counselors, family, and friends.
- In the words of Winston Churchill, never, never give up!
- Keep experimenting with treatment approaches until you find one that works. There is an approach out there with your name on it!

Appendix C. Mail/Telephone Questionnaire⁶ (printed in tabloid format)

- Q8. When you were a young teenager, with whom did you live?**
- Family with two parents
 - Family with only one parent
 - Family of other relatives (e.g., grandparents, aunts/uncles)
 - Foster family
 - Children's group home
 - Other ⇨ *Please describe:* _____

- Q9. Did the adults with whom you lived as a teenager work outside the home?**
- Yes, one or more worked outside the home
 - No, no adult worked outside the home
 - Not sure (e.g., Don't Remember)

This completes the survey.

- Q10. Is there anything you would like to add? IF SO, PLEASE USE THE SPACE BELOW.**

- Q11. Did anyone help you understand and/or complete this survey? IT IS PERFECTLY OKAY IF THEY DID.**
- Yes ⇨
 - An ISSP or employment service staff member
 - Someone else (*please describe:* _____)
 - No

Thank you for participating in the ISSP project, from which a great deal of value has been learned! Help us get the picture!



Help us get the picture!

Survey of Participants in the *Individual Self-Sufficiency Planning (ISSP) Project*

ID# _____
Confidential

Explanation

The purpose of this survey is to learn from your experience with the ISSP project, so that services and supports can be responsive (1) to each person's needs and aspirations, and (2) to certain public policy objectives of the funding source (e.g., reducing reliance on Social Security disability benefits). This survey is **confidential and anonymous**. The ID#, above, is simply to avoid asking you to complete the same survey twice. Your name will never be on this questionnaire. Only grouped information will be reported. We would appreciate your candid views. There are no right or wrong answers. If you have any questions about this survey or need help with the questionnaire, please get in touch with an ISSP staff member (names and phone numbers on a slip of paper, enclosed) or John Shea of Allen, Shea & Associates, who can be reached toll-free at 1-800-583-4515, or by Email at allenshea@sbcglobal.net.

- Q1. Are you currently enrolled in the ISSP project?**

- Yes
- No

- Q2. Are you currently working?**

- Yes ⇨ I am working . . .
 - 20 or more hours per week for pay (or profit)
 - 19 or fewer hours per week for pay (or profit)
 - in a volunteer job
 - as a homemaker
 - at something else (*please describe:* _____)
- No

- Q3. Whether working or not, are you looking for a job, or going to school or college?**

(CHECK ALL THAT APPLY)

- Looking for a job (or, another or different job)
- Going to school or college
- Doing something else ⇨ *What? (please describe:* _____

⁶ We used slightly different versions of this questionnaire. For the San Mateo site, Q5.3 read: San Mateo Vocational Rehabilitation Services staff. For the Kern site, Q5.3 read: Kern Vocational Services staff.

Success Stories and Survey Results

Q4. How important (or, unimportant) were the following in your decision to enroll in the ISSP project? PLEASE CIRCLE A NUMBER ON A SCALE FROM 1 (NOT IMPORTANT AT ALL) TO 10 (VERY IMPORTANT).

Factor	How important was this factor in <i>deciding to enroll</i> in the ISSP project?									
	Not important Very important									
1. Family expectations	1	2	3	4	5	6	7	8	9	10
2. MD or counselor advice	1	2	3	4	5	6	7	8	9	10
3. Peer group or expectations of friends	1	2	3	4	5	6	7	8	9	10
4. My own personal interest and motivation	1	2	3	4	5	6	7	8	9	10
5. Economic necessity	1	2	3	4	5	6	7	8	9	10
6. Possibility of Social Security "waivers"	1	2	3	4	5	6	7	8	9	10
7. Other (please describe: _____)	1	2	3	4	5	6	7	8	9	10

Q5. Please use check marks (✓) to indicate (1) your involvement with each person or group, and (2) if involved, how supportive of your work efforts the person or group has been while in the ISSP project. PLEASE CIRCLE A NUMBER ON A SCALE FROM 1 TO 10.

Are you involved with this person or group?		Person or group	How <i>supportive of your work efforts</i> has this person or group been?									
Yes	No		Not at all supportive Very supportive									
<input type="checkbox"/>	<input type="checkbox"/>	1. Family	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	2. Friends	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	3. San Mateo Vocational Rehabilitation Services staff	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	4. Department of Rehabilitation counselor	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	5. Mental health counselor	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	6. Psychiatrist	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	7. Substance abuse counselor and/or 12-step group	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	8. Job support group	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	9. Spiritual belief system and/or faith community	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	10. Other (please describe: _____)	1	2	3	4	5	6	7	8	9	10

Q6. Please use check marks (✓) to indicate (1) whether you received each service while in the ISSP project, and (2) if received, how useful each service was for you. PLEASE CIRCLE THE NUMBER FROM 1 TO 10.

Did you receive this service?		Service	How <i>useful</i> was the service?									
Yes	No		Not at all useful Very useful									
<input type="checkbox"/>	<input type="checkbox"/>	1. Accessing (or, maintaining) public benefits (e.g., Social Security, food stamps, housing)	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	2. Help finding a job (or, a better job)	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	3. Help keeping a job, or progressing in a career	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	4. Vocational (career) counseling	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	5. Help improving your health (e.g., symptom management)	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	6. Information and referral(s): e.g., housing, mental health, substance abuse services, etc.	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	7. Benefits/financial counseling and assistance	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	8. Mental health services (e.g., medication, therapy)	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	9. Something else (please describe: _____)	1	2	3	4	5	6	7	8	9	10

Q7. Is there anything about the ISSP project (services, personnel) . . .

7a. that you *especially liked*? IF SO, PLEASE DESCRIBE.

7b. that you *did not like* or which *could have been better*? IF SO, PLEASE DESCRIBE.

Appendix D. Pamphlet Accompanying Questionnaire

questionnaire. Therefore, there is no way that the information you provide in the questionnaire can be used to affect directly any services currently being received, or for that matter, one that you may ask for in the future.

If I have any questions about the survey, who can answer them?

If you have any questions or concerns about the survey, you may contact ISSP project staff (see slip, enclosed) or John Shea of Allen, Shea & Associates, who can be reached toll-free at 1-800-583-4515, or by Email at allenshea@sbcglobal.net.

Thank you for participating in the survey. As a token of our appreciation, we will send you a summary report of findings by the end of the year, if you mail back the postage-paid postcard.

John Shea, Survey Director
Allen, Shea & Associates
1780 Third Street
Napa, California 94559

A Survey of Participants in the
Individual Self-Sufficiency
Planning (ISSP) Project



Help us get
the picture!

ANSWERS TO SOME QUESTIONS YOU MAY HAVE ABOUT THIS SURVEY

How was I chosen to participate in this survey?

The ISSP Statewide Coordinating Committee asked the project Evaluation Team to survey everyone who has participated in the ISSP project, whether still enrolled or not. You are one of about 285 individuals served at some time by the project.

What is the purpose of the survey?

The purpose of the survey is learn from project participants, whether the project helped them achieve their goals, what services were most useful, and what, if anything, could be improved. This information will help service providers to improve their work, and to design services that make the most sense to individuals like yourself, and help accomplish public policy goals, such as helping individuals reduce their reliance on public benefits.

Who is paying for this survey?

This survey is being paid for by the California Department of Rehabilitation, from funds provided by the Social Security Administration in support of the ISSP project, a research and demonstration effort.

Who is conducting the survey?

Allen, Shea & Associates, and its sub-contractor, The Results Group, are carrying out the survey, under contract with the Department of Rehabilitation.

Why are you collecting this information with a questionnaire?

We have two main reasons for asking you to fill out the questionnaire. First, we want the results of the survey to provide a relatively complete and accurate picture of how individuals served by the ISSP project view their experience with the project. Second, information from project participants is rarely obtained in a systematic way. Only you have the answers to most of the questions.

Why are you asking about services (such as Social Security staff, mental health case managers, medications, therapy) which were not provided by ISSP project staff?

The Benefits and Service Coordinators had responsibilities to assist you with SSA, to help link you to services and supports in many realms, and to help in various other ways.

How long will it take to complete the questionnaire?

It should take about 10 minutes. Please take your time. We want your carefully considered response. We value your views about services and supports, and your experiences with the project.

Why do you have an identification number on the questionnaire?

There are two reasons for having an identification number on the questionnaire. First, we want to know who responded, to avoid bothering you with follow-up phone calls. We will try to reach some of those who do not respond to our mailing, so that we can address any concerns they may have and encourage or help them to participate in the survey. Second, we want to be able to report to what extent respondents differ, on average, from non-respondents in terms of county, year enrolled in the project, and whether still participating.

How can I be sure that any services presently received won't be affected by my answers?

All of us working on this project are required to follow certain guidelines and procedures to protect the identity of persons responding to the survey. We will be combining responses in such a way that no person can be identified. The information you provide will not be shared with anyone in a way that your name can be identified. Only Allen, Shea & Associates knows which name is linked to which identification number. At no time will a name be placed on the

Appendix E. Questionnaire Survey Results

Enrollment and employment status

Q1 asked: “Are you *currently* enrolled in the ISSP project? Seven-tenths (74/106) answered Yes. Q2 asked: “Are you *currently* working? 55% (58/105) said Yes. Forty-five of the 58 said they were working for pay (or profit). Seven said they had a volunteer position and were not working for pay. And four said they were homemakers and not working for pay. Those who said they were working “at something else (please describe: _____),” said the following:

- Hospitalized, clean on my own.
- Looking for employment.
- In cafeteria [at SES].
- Disability due to surgery.

Q3 asked: “Whether working or not, are you looking for a job, or going to school or college? The response categories were (1) looking for a job (or, another or different job); (2) going to school or college; and (3) doing something else, and if so, describe. Respondents were asked to CHECK ALL THAT APPLY. All told, 41 said they were looking for a job (or, another job); 24 said they were going to school or college; and 26 said they were doing something else (what? Please describe: _____). Here are responses of those who said *doing something else*:

- Maybe volunteer or just making a salary so I can get by each month.
- Looking into doing my own business. Part-time - related to real estate.
- Helping Alzheimer father, caring for family member.

Success Stories and Survey Results

- I baby sit sometimes.
- Unpaid day care for my grandchildren.
- Service work, meetings, appointments.
- Mentoring to the mentally ill, involved in a new project that is trying to help the homeless off the streets.
- Nothing.
- Doing nothing since "Furlough" a year ago. Never heard there was a project.
- My secretary job at Saint _____ Episcopal is awaiting me upon recovery from psychotic break.
- Director of the Stamp out Stigma (SAS) program - a nonprofit agency, to dispel the common myths and stereotypes surrounding mental illness.
- On medical leave.
- Looking for a place to live.
- I go to a group at [county] mental health.
- Taking care of health problems. Considering going to training for another type of work.
- Being a single mother.
- Going to church.
- Enjoying life as Senior citizen, my job is perfect.
- I was looking for a job, but have an ankle injury. When it is better, I will resume job search. Also working on a novel.
- Disabled.
- Getting myself ready to start school in Fall of this year.
- Self study about electricity and electronics.
- Just taking a break from being fired.
- Going through Dialectical Behavioral Therapy (DBT program) for borderline personality disorder, and am currently looking for a part time job.
- Vacation.
- I am too disabled to work.

Deciding to enroll

Q4 read: "How important (or, unimportant) were the following in your decision to enroll in the ISSP project?" Respondents were given a 10-point scale from *Not important* (1) to *Very important* (10). Responses to this question were highlighted in the body of this report (on pages ___ to ___). There was an open-ended factor, "Other (please describe:_____)", and this is what individuals had to say in the person's own words, or in the words of our telephone interviewer:

- It would benefit her future job and she could get her education at the pace she desired, and had time to do it her way and take her time.
- Help dealing with Social Security.
- Wanted training for a better job.
- I need a vacation to start a job.
- Curious as to how it could help me.
- She was allowed to attend some of the first meetings to plan the project because she worked with VRS. So knowing about it to that degree made her more interested in it. She also liked the idea of not relying on someone referring her. She referred herself.
- To get educated, to point where someone could afford to hire her because her health insurance is so high.
- Something I wanted to do.
- Assistance with Social Security notices, benefits, payments, related paperwork (including Medicare, and Department of Rehabilitation).
- Having the person (Joe) to help with things, one on one.
- Became more ill.
- The letters from Social Security were stressful, too much work, sometimes received 2-3 letters a week.
- Support in becoming more independent.
- Socially responsible.
- Occupy time.

Success Stories and Survey Results

- Employment and Social Security waiver incentive.
- Personal goals.
- Keeping on track my disability payments.
- Benefits counseling.
- Additional support.
- Housing.

How supportive of your work efforts

Q5 read: "Please use check marks (II) to indicate (1) your involvement with each person or group, and (2) if involved, how supportive of your work efforts the person or group has been while in the ISSP project." Respondents were given a 10-point scale from *Not at all supportive* (1) to *Very supportive* (10). The *N* is the number who said Yes to the lead-in question, "Are you involved with this person or group?" Means and standard deviations are based on the appropriate *N*. Results are shown in Table E-1.

Table E-1. Scores (Mean and Standard Deviation) on Whether Supportive of the Respondent's Work Efforts

Person or group	<i>N</i>	Mean	Std Deviation
Family	63	7.7	2.6
Friends	49	7.8	2.4
San Mateo (or Kern) Vocational Services staff	80	8.9	2.1
Department of Rehabilitation counselor.....	72	7.6	2.7
Mental health counselor.....	76	8.3	2.5
Psychiatrist.....	76	7.8	2.8
Substance abuse counselor and/or 12-step group..	22	8.0	2.5
Job support group.....	29	8.1	2.8
Spiritual belief system and/or faith community.....	47	7.7	3.1
Other (please describe: _____)	13	9.0	2.5

Thirteen respondents checked "Other (please describe: _____)." Here are the individuals and groups named:

- Gym, YMCA.

Success Stories and Survey Results

- Holy Spirit Angel Gabriel.
- Mental health clients group therapy.
- AA (Alcoholics Anonymous).
- My family wants me off disability.
- Would like a job support group.
- Counselor at college.
- ISSP staff.
- Disabled students program, services, psychological services at community college. Mental health assoc - peer counselors (2). DMDA support group, NAMI, related support group for mental illness (2).
- Case managers.
- Psychologist.
- A whole team of counselors at VRS, Kaiser, Caminar partnership.
- My doctor.

Usefulness of services

Q6 asked about the usefulness of services. It read: "Please use check marks (II) to indicate (1) whether you received each service while in the ISSP project, and (2) if received, how useful each service was for you." Again, responses to this question have been reported in the body of this report, on pages ___ to ___. As for the "Something else (please describe:_____)" item in Q6, here is what respondents had to say:

- Help driving places due to anxiety of traveling.
- Would like vocational counseling.
- Has a PASS account.
- Moral support (crisis mgmt, especially around working).
- Truly caring about us is very important to me.
- Help with other resources (obtaining food thru second harvest, completing rental assistance claim forms).
- Therapy to improve confidence to be totally independent.

Success Stories and Survey Results

- Confidence building and support from the staff (changed my life).
- The support.
- Internet.
- Self-esteem support from ISP team.

Things especially liked

Q7a said: “Is there anything about the ISSP project (services, personnel) that *you especially liked*? IF SO, PLEASE DESCRIBE. The entire set of responses, categorized by theme (*first mentioned* or *global*), as already been presented in the body of this report, on pages ___ to ___.

Things did not like or that could have been better

Q7b said: “Is there anything about the ISSP project (services, personnel) that *you did not like* or which *could have been better*? IF SO, PLEASE DESCRIBE. Again, the entire set of responses has been organized by theme and presented in the body of this report on pages ___ to ___.

Anything else?

Asked (Q10), “Is there anything you would like to add?,” respondents had these things to say:

- I've had a great time working with the ISSP program and the counselors. Hope to continue working with them in the near future. There have been times I felt like giving up but the support I received with this program kept me from giving up.
- I wish someone would bring a type of program around that wouldn't make people want to give up. People that are on SSI are struggling for their mental

Success Stories and Survey Results

- health, and they'll try so hard to work, even if they're feeling unwell. She feels that there is a lot of injustice in the system, and that even though Social Security is trying to help, we're still taking steps backward.
- He wanted to contribute again, wanted to count, in this society you have to work to be counted.
 - Should have stayed in school, then looked for work college. Thank you for your support.
 - Please fund ISSP project in the future.
 - This program is still very helpful to me, especially when it comes to understand my supervision ways and means.
 - Q6 was confusing, I received such services but not through any ISSP connection.
 - I have a way to get out of my disability, but I need help.
 - Sad to see it ending and some of the counselors will be leaving or doing other work.
 - He enrolled but never really participated. He was on the waiting list and never involved himself with the program.
 - If I could get paid more at my job than what I get now.
 - The directives of this grant were fairly narrow.
 - Friends, work, home, school - part of [undecipherable].
 - (Amy's note) Answers on this interview are questionable concerning validity, trouble staying on topic and many "I don't remember" were common occurrences during the interview.
 - 1) The ISSP program gave all of us that were involved one of the biggest reasons to get better (health wise). 2) The biggest reason was believing in myself again. 3) It gave me a dream for the future. 4) The program was the best thing Social Security ever had to offer people on SSI. (Many people are no longer on SSI but are now self-supporting.)
 - He considers himself very lucky that he had all those people to help him out. They've been there with him since 1998, when he "went disabled."

Success Stories and Survey Results

- We can learn from BARC, who actually employs the mentally retarded (brother David is MR). He didn't have to go through the terror I experienced jumping in cold turkey at Denny's. I have finished my book, "The Healing" which journals 30 years in and out of lock-down wards. Perhaps this will launch my career as an entertainer and my hit single "Will You Remember Me."
- Thank you for the incentive to work last year, being a substitute teacher built my confidence as a person and also allowed me to pay off a small amount of loan money.
- Never heard of ISSP project. A waste of money and time.
- She would like to see about getting into a program having to do with "job rehabilitation" to get a better job. Getting a better job is intimidating, but she wants one. She could use some help in job searching and job training.
- This has been a very good experience for her. She's since bought her own house, and she appreciates being part of the program.
- Thanks for the good intentions.
- No, but thank you.
- I also purchased two \$500 savings bonds with the extra money.
- Need help with clothes (I'm hard to fit.). Need info at www.autism-diet.org.
- LORD GOD
- I think ISSP is a very good and helpful program.
- If my health had held, this program would work for me.
- Did not speak English, so unfortunately we only got through the first three questions.
- When I was working at Target, they don't talk to me of what I should do on the job. Not enough training.
- He didn't want to finish the survey and claimed he didn't get into the program and really involve himself in it.
- I can do better. The counselors are the very best!
- The service that the counselors provide folks that are on SSI have to continue because of the complexity and the fear that clients have on losing the only

Success Stories and Survey Results

- money safety net that SSI provides. Joe Henning and Nancie Broman provide a caring and professional service.
- In my case, me and my wife at the time tried everything we knew with NO RESULTS. Thank God we finally found KLP and it's life saving help.
 - I love the ISSP program! It gives us consumers a second chance to prove ourselves. Many of us are smart, talented and creative & I wish the stigma could be wiped away of mental illness.
 - I plan to work part time until my first year of DBT therapy is completed. Then I plan to attend career service center to be trained as a medical assistant so I can get off Social Security. ISSP made it possible for me to get the courage to re-enter the work place. I would like to add that I worked for one year at ____ [a drug/variety store]. The only problems I had were concentration and anxiety and anger due to my personality disorder. So, I'm in therapy to get better so I can work full time eventually.
 - Q9 -- Married at 16 of age till 20 years of age.
 - She didn't really understand what she was/is involved with and had trouble having a conversation and didn't understand what I was saying most of the time, so we only got through a few questions.
 - Answer moved to 7b.
 - I have benefited from the ISSP project. They help me maintain a limit of hours and wages I earn and be able to receive Social Security benefits at the same time.
 - The professionalism of the ISSP staff I worked with was excellent.
 - I deeply hope that what was done on the project becomes SSA law and practice for everyone.
 - This survey was done with the knowledge that the respondent didn't know what the ISSP project was and didn't know they were signed up for it, but I went ahead with some questions anyway, because the project was in play for 6 years and we can still find out what services he used.

Messages received as a teenager

Near the end of the questionnaire, we asked (Q8): “When you were a young teenager, with whom did you live?” Responses have been summarized and presented in the body of this report on pages __ to __. Under “Other (please describe: _____),” as part of Q8, respondents described who they lived with as young teenagers as follows:

- At first with my mom only, then she died and lived with dad and stepmother.
- All of the above.
- Room with strangers.
- My mother died when I was sixteen. After that, I lived with my father and took care of my sisters and brother.
- However I was in boarding school. I went home most weekends and holidays
- Juvenile hall - boarding school.
- Mom and stepfather.
- At age 15, I was a runaway.
- My mother passed away while I was a teenager.

Q9 asked: “Did the adults with whom you lived as a teenager work outside the home?” Again, the response pattern has been presented, on pages __ to __ of this report.

Help in completing the survey

In response to Q11, “Did anyone help you understand and/or complete this survey?,” only 10% of those who answered the question (6/62) said that they had help. Five of the six used the services of an ISSP staff member.

