

INDIVIDUAL PLACEMENT & SUPPORT
LEADING FOR EXCELLENCE:
TRAINING FOR IPS
SUPERVISORS

COURSE MANUAL

Personal development plan	3
Team action plan	4
IPS principles	5
Reflective cycle	6
Factors affecting IPS implementation or service expansion	7
Stakeholders	8
IPS client journey flow chart	9
Manager versus leader	11
IPS field mentoring observations	15-17
Fidelity review action planning	18-19
Handling difficult conversations	20
Performance management	25
IPS fidelity scale	26-52

PERSONAL ACTION PLAN

Action	Who	When

TEAM ACTION PLAN

Action	Who	When

IPS PRINCIPLES

IPS (Individual Placement and Support) supports people with health barriers into employment. It has eight key principles, each of which is needed for the service to work well.

The principles focus on **rapidly** placing someone into a **paid** job that relates to their **personal preferences** and building relationships with local **employers** to do so. **Support** continues once the person gets a job and is provided together with **treatment** care and **welfare benefits advice**. IPS does **not exclude** anyone, meaning anyone who wants to work is eligible for employment support.

The service should be *individual* to a person's needs and wishes; offer rapid *placement* in work; and provide ongoing *support* for as long as it is needed.

1. Competitive employment is the primary goal

The fundamental assumption should be that paid employment (part-time or full-time) is a realistic goal for everyone who wants a job, and the central goal of the service must always be paid employment.

2. Everyone is eligible

There are no 'eligibility criteria' for entry into IPS programmes beyond an expressed motivation to 'give it a try'. This should be irrespective of issues such as job readiness, symptoms, substance misuse, social skills or a history of violent behaviour.

3. Job search is consistent with individual preferences

Working closely with someone's personal interests and experience significantly increases the chances of them enjoying and retaining a job.

4. Job search is rapid

The job search should be started early (normally within one month) to get people into work quickly whilst they are motivated and interested in working.

5. Integration of employment specialists and treatment teams

One of the most crucial aspects of the IPS approach is the quality of joint working between employment specialists and the treatment teams. Employment specialists should be integrated and actively take part in assessment meetings.

6. Support is time-unlimited and individualised to both the employer and employee

The IPS approach is 'place-then-train', rather than 'train-then-place', and works to get an individual into work quickly, and then consider training needs once they are in post.

7. Welfare benefits counselling supports the person through the transition from benefits to work

Many IPS clients will be on some form of benefits, therefore it is essential to understand how working could affect an individual's current financial situation.

8. Employer engagement

High performing employment specialists build relationships with local employers, face to face, to make an ideal job match.

Adapted from the full paper "Briefing 37: Doing what works" by Centre for Mental Health.

REFLECTIVE CYCLE

Gibbs' reflective cycle is a popular model for reflection. The model includes 6 stages of reflection and is presented below.



"It is not sufficient simply to have an experience in order to learn. Without reflecting upon this experience it may quickly be forgotten, or its learning potential lost. It is from the feelings and thoughts emerging from this reflection that generalisations or concepts can be generated. And it is generalisations that allow new situations to be tackled effectively."

Gibbs G (1988). Learning by Doing: A guide to teaching and learning methods

FACTORS AFFECTING IPS IMPLEMENTATION OR SERVICE EXPANSION

Breakout activity

In groups of three:

- ⦿ Discuss the factors you think affect implementing or expanding a successful IPS service
- ⦿ Identify:

Influencing factors (positive)

Detracting factors (negative)

STAKEHOLDERS

- ⦿ IPS client
- ⦿ External professionals who link with the service
- ⦿ Treatment team members
- ⦿ NHS service senior managers
- ⦿ Employment specialist
- ⦿ IPS team supervisor
- ⦿ Employers & co-workers



What practical challenges to the principles allocated to you might be raised by any of the stakeholders? What are the solutions?

COLLECTING STAKEHOLDER FEEDBACK

When I was struggling during the first few weeks, my Employment Specialist was brilliant. They phoned me and even met me after work. Without them I would not be still be at work.

My

My employment specialist really gave me confidence that I could get a job. He helped me with my cv and arranged a work trial which led to full-time work. Thank you.

I referred Josie to the service and she has been supported into her dream job. Great work by Sunita.

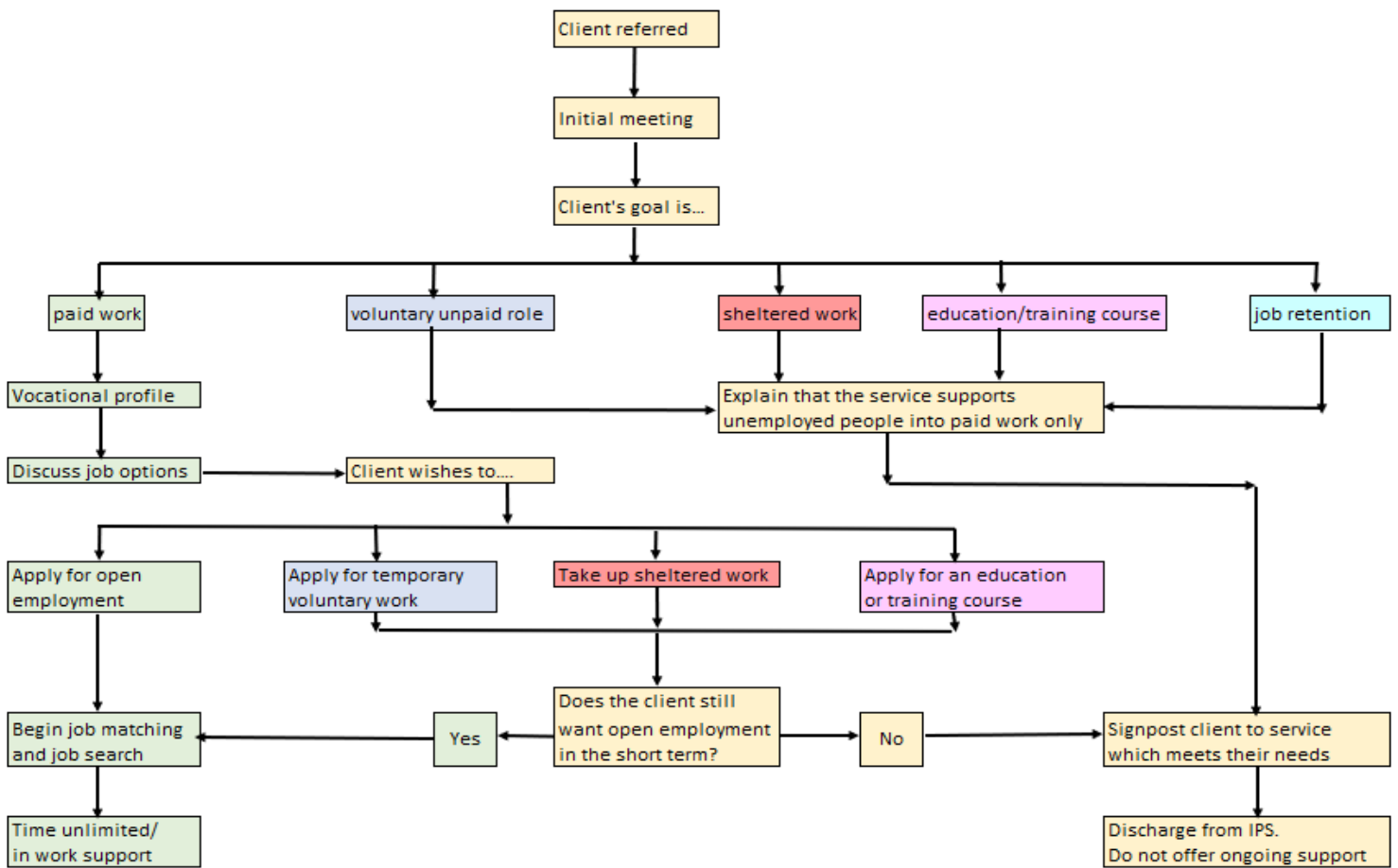
Just brilliant. Everyone should have access to an IPS Service.

I was so nervous but Tina was so patient. She was a great listener. She found me a job at X store. I really enjoy my job. It is great knowing that I can ring her anytime.

I was worried about to explain not working for a few years but with Rob's help I managed to get a great job and have just increased my hours.

John contacted me to say he was looking to place someone in paid work. He met with me and explain the service and how they match someone with our job and keep in contact afterwards. I can recommend this service to other Employers. And it's all for free!

IPS CLIENT JOURNEY FLOWCHART



EXERCISE: MANAGER V LEADER QUALITIES

Think about the line manager (or managers) you most enjoyed working for? What was it about them or their style that you liked?

Thinking about the same 'best line manager(s)', write below any factors you can think of that made them more of a 'leader' than a 'manager'

Manager	Leader

Breakout activity

- ⊙ Reflecting on supervisory practise, work in threes:
- ⊙ discuss current practice
- ⊙ reflecting on strengths-based supervision discuss:
 - what do you do well and
 - any changes you would make?

Current supervisory practice

What are the strengths?

Any practices/areas to change?

EXAMPLE EMPLOYER DATABASE

Name of employer	Employer address	Tel no.	Name of contact	Type of business	Type of jobs	Likely hours of work	Contact date	Outcome of contact

EXAMPLE DATABASE FOR LOGGING EMPLOYER ENGAGEMENT CONTACT

Client	Employer	Last contact	Contact type - Face to face - Phone call - Email - Tour / visit	Cup of Tea number	Next contact planned	Details
Simon	Perry's Garden Centre	10/10/2019	Face to face	1	11/10/2019	Called into garden centre and spoke to hiring manager, briefly introduced myself and arranged to come back to see him next on Tuesday week.
Simon	Perry's Garden Centre	11/10/2019	Email	1	26/10/2019	Email follow up to confirm appointment
Simon	Beautiful Blooms Nursery	10/10/2019	Face to face	1	11/10/2019	Walked into garden nursesey centre, they were too busy to meet and asked me to contact again in two months time.
Simon	Beautiful Blooms Nursery	11/10/2019	Email	1	11/12/2019	Emailed to thank for speaking with me, confirmed I would be in touch in December, and attached some information on the service.

IPS FIELD MENTORING OBSERVATIONS

Employer Engagement

Date:

Name of employment specialist:

Name of employer:



Items covered	Observed	notes
Client given IPS info		
Was an appointment made in advance of this meeting?		
Was an appointment made as a follow-up to find out more about the employer?		
Did ES find out about the business? (history, locations, type of product/service provided)		
Did ES find out about hiring preferences?		
Did ES find out about different types of roles at employer?		
Did ES find out about type of candidate employer feels is a good match? (Skills, strengths, qualifications)		
Was ES following up on a client's application?		
Did ES describe a client who is a good match to employers hiring preferences?		
Did ES explain service to employer?		
Where there actions agreed at the end of the meeting?		

Clinical Team Meeting/MDT

Date:



Name of employment specialist:

Clinical team:

Items covered	Observed	notes
ES attends whole of meeting		
ES/IPS has section on agenda		
ES updates team on clients		
Team engages in discussion on client update		
ES shares information about client's work or education history		
Team generates ideas to suggest to client		
Team provide information /solutions relevant to individualised job search		
Team provide information/ solutions relevant to job support		
Team discuss possible referrals to ES		
ES suggests possible referral to IPS for new clinical team client discussed		
Are client records or documents shared during the meeting?		
Are client records or documents shared during the meeting?		

IPS team meeting / group supervision

Date:



IPS team observed:

Items covered	Observed	notes
IPS team has met as a vocational unit		
Client successes are shared		
Team discusses client challenges/ barriers as a group		
Solutions and ideas developed during group discussion on challenges/ barriers are captured		
ES's share job leads		
Targets and goals are shared by Service Lead with the team (i.e. total referrals, active clients, job starts, job sustainability, discharge numbers)		
Team discusses engagement activity with JCP/DWP programmes		
Learning and development is discussed		

FIDELITY REVIEW ACTION PLANNING

Exercise: To create a fidelity review action plan for item 13 Disclosure

1. Read the fictitious fidelity review report document 'Item 13 disclosure example report' on the next page.
2. Based on this report, your task as IPS Supervisor/Team Leader is to write a Fidelity Review Action Plan which will improve your team's delivery of this fidelity item when supporting clients.
3. This is not about suggesting actions to have new formats or new places to record the disclosure conversations, as that is already in place.

Using the format below, write down specific actions with responsibilities and deadlines, which will lead to higher fidelity scores at your next review in 6 months' time. Think SMART.

Fidelity review action plan activity: Item 13 Disclosure		
Action	Responsibility	Deadline
Notes		

FIDELITY ITEM 13

Disclosure

Employment specialists provide clients with accurate information and assist with evaluating their choices to make an informed decision regarding what is revealed to the employer about having a disability.

1 Point	None are present	<ul style="list-style-type: none"> Employment specialists do not require all clients to disclose their psychiatric disability at the work site in order to receive services.
2 Points	One is present	<ul style="list-style-type: none"> Employment specialists offer to discuss with clients the possible costs and benefits (pros and cons) of disclosure at the work site in advance of clients disclosing at the work site. Employment specialists describe how disclosure relates to requesting accommodations and the employment specialist's role communicating with the employer. Employment specialists discuss specific information to be disclosed (e.g. disclose receiving mental health treatment, or presence of a psychiatric disability, or difficulty with anxiety, or unemployed for a period of time, etc.) and offers examples of what could be said to employers. Employment specialists discuss disclosure on more than one occasion (e.g. if clients have not found employment after two months or if clients report difficulties on the job.)
3 Points	Two are present	
4 Points	Three are present	
5 Points	Four are present	
<p>Comments:</p> <p>It was clear from interviews with clients, employment specialists and the supervisor that there is no requirement for clients to disclose in order to receive IPS support.</p> <p>Evidence to support giving credit for the other anchors was lacking. In the client records viewed, the vocational profile forms recorded only 'yes' or 'no' answers to 'would the client like to disclose?'. There was no evidence of discussing pros and cons, or the specifics of what could be disclosed, or of disclosure being discussed more than once. We also saw no evidence to support this in the sample client progress notes reviewed.</p> <p>Clients interviewed recalled being asked 'do you want to disclose?', but not any discussions about what that meant, or the pros and cons of disclosure, or the details of what could or could not be said, or discussing disclosure on more than one occasion. This suggested that disclosure discussions were not taking place as defined by this item.</p> <p>Service data collated by the supervisor did not provide any evidence to support giving credit for anchors 2-4.</p>		
<p>Recommendations:</p> <p>A higher score can be achieved by ensuring that client disclosure discussions include consideration of pros and cons (anchor 2), the specific details of what can be disclosed (anchor 3), and of discussions occurring more than once (anchor 4), closely following the requirements as defined by this fidelity item.</p> <p>Higher scores will be achieved if employment specialists conduct disclosure discussions as defined by this item, and use the relevant sections of the vocational profile form to initially gather and then keep updated this disclosure-related information.</p> <p>We recommend that the supervisor devises then implements ways to monitor how closely the employment specialists are fulfilling the criteria for this item. The need for additional disclosure training or support for the employment specialists should be considered.</p>		
<p>Criterion: Services</p> <p>Data sourcing: MIS/CMS DOC INT OBS IEP/VP</p>		

HANDLING DIFFICULT CONVERSAIONS

Taken from IPS Grow:

Preparation Guide

This document is designed to help you to prepare to handle difficult conversations. Take the time to consider the below questions and prompts to support you in holding these discussions.

1. What do you want to achieve from this meeting (purpose)?
2. What will be covered in this meeting (agenda)?
- 3a. Who is attending this meeting? What is their role? Consider what will they do during the meeting and how much time will they need.
- 3b. Do you anticipate that they will want to discuss anything? Yes / No. Consider how this may have an impact on the agenda (maybe now it will need re-ordering?)
4. What decisions need to be made at the meeting? What is the likely impact? Consider intended and unintended consequences.
5. What issues/ barriers may emerge (past or present), and how will you overcome these?
6. Have you identified a method for recording key actions and considered how these are attributed correctly? Consider this below:
7. What emotions might emerge (in you/them) and how will you address/manage these?
8. Additional thoughts/ notes

X, Y, Z TECHNIQUE

When you said/did this _____ (state what happened)

This is how I or others felt/reacted _____ (share impact)

In future it would be preferable if you say/do this _____ (provide solution)

You feel _____

Others have also felt _____

However, they have found _____

You feel _____

Others have also felt _____

However, they have found _____

You feel _____

Others have also felt _____

However, they have found _____

Notes

STAFF RETENTION - BREAKOUT ACTIVITY

In groups, plan an induction programme for staff new to role and working in IPS services

- A. First week
- B. First month
- C. First 3 months

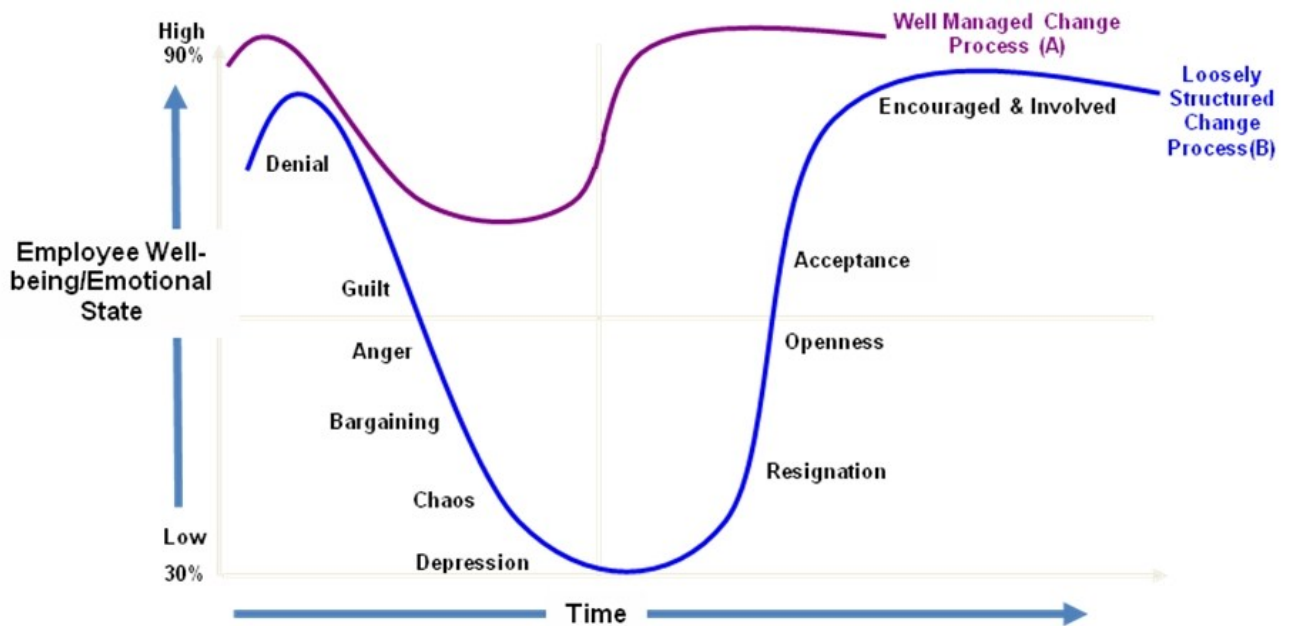
Notes

RUNNING ASSESSMENT CENTRES - TOP TIPS



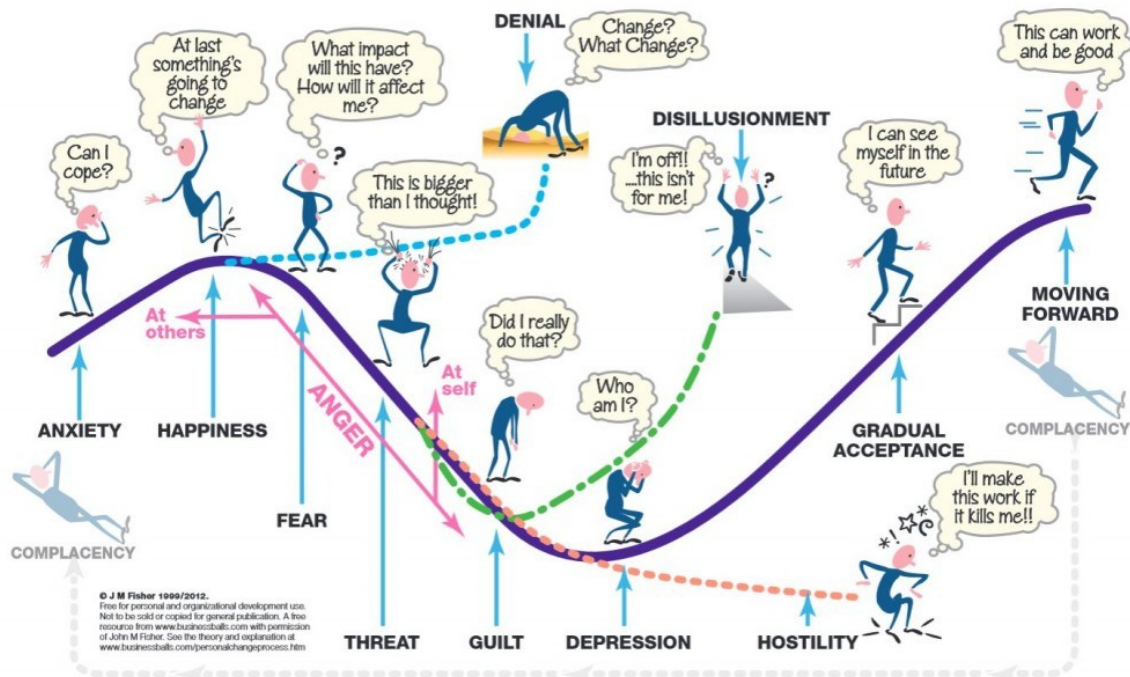
- 1.** After telephone pre-screening identify how many candidates are being invited for face-to-face assessment. May need more than one day to assess all candidates across a range of activities.
- 2.** Identify what activities will help assess candidates (mix of role play, hybrid competency-based interview, case study, presentation).
- 3.** If there are just 3 candidates who have been shortlisted following the telephone interview and you are running short of time, you may find it beneficial to hold a 2-hour assessment which includes the role play and face to face interview only, rather than a full assessment day agenda.
- 4.** Secure sufficient numbers of assessors for the assessment as well as a coordinator to support the process to run smoothly. Consider service user involvement e.g. on panel or watching presentations.
- 5.** Book some space for the assessment – We would recommend the use of two rooms. One room for the candidate to interview, carry out the role play, presentation etc. The second room is for the waiting candidates.
- 6.** Schedule candidates into different assessment windows and manage communications.
- 7.** Create candidate and assessor timetables for each day. Consider breaks and refreshments.
- 8.** Create assessor packs including job descriptions, person specifications, activity outlines and scoresheets.
- 9.** Print assessment centre materials for each day. Collate any other resources required for the day (e.g. name labels).
- 10.** Confirm attendance with candidates 3 days before each event and manage any changes, fill gaps as required.
- 11.** Manage any reasonable adjustments for candidates with disabilities.
- 12.** Set-up assessment centre rooms as required. If possible, have someone act as receptionist.
- 13.** Greet and brief candidates and assessors to ensure they understand what the day entails and what their responsibilities are.
- 14.** Co-ordinate flow of the day and troubleshoot any issues that arise.
- 15.** Collate all scores into a spreadsheet and meet with panel to agree who should and shouldn't be made a job offer. Consider weightings given to various activities e.g. someone may score highly on presentation but badly in interview.

CHANGE MODELS



Source: <https://knowhow.ncvo.org.uk/your-team/people-management-skills/change/tools/transition>

The Process of Transition - John Fisher, 2012 (Fisher's Personal Transition Curve)



For further explanation please visit:

<https://www.businessballs.com/change-management/personal-change-stages-john-fisher/>

PERFORMANCE MANAGEMENT

Effective Change Communication

Communication – teams/stakeholders need to understand the why, when and how of any new change.

- Preparation – set the scene
- Sell the idea of IPS and the benefits it will bring
- Collaboration
- Involve people who will be affected
- Develop a common vision
- Listen to the challenges
- Address any fears
- Produce evidence
- Build resilience

Daam Model

DAAM MODEL

- ⊙ **Direction** – Does the ES **understand** the journey/purpose?
- ⊙ **Authority** – Does s/he realise they have the **relevant authorities** to act?
- ⊙ **Ability** – Is the issue about their **ability**?
- ⊙ **Motivation** – How **motivated** is the ES?



Using the Daam model is useful to understand the barrier/problem/issue that is affecting team or individual performance. Be curious as to why tasks are not being carried out by the employment specialist (ES).

Four stages to consider:

Direction – may need to revisit the “why”. (Team or service mission, IPS key principles, quality, IPS fidelity, client preference)

Authority – do they understand that they can act without waiting for confirmation from you as TL?

Ability – is coaching or additional training needed? What support do they need from you or others in order to carry out the task?

Motivation – exploring is anything else going on for them.

IPS FIDELITY SCALE

Reviewer				
Employment service and site				
Employment specialist				
Fidelity review date	Fidelity review date	Date of previous review		Time elapsed since last review
Total score	Fidelity review score this review	Fidelity level this review	Fidelity review score last review	Fidelity level last review
Summary				
Exemplary score	115 – 125			
Good fidelity	100 – 114			
Fair fidelity	74 – 99			
Not IPS	73 and below			

Data sources:

- MIS** Management Information System
- DOC** Document review of employment service and clinical records, NHS Trust policy and procedures
- INT** Interviews with clients, employment specialists, mental health staff, related programme staff, partner organisation staff, families, or employers
- OBS** Observations of team meetings and employment specialists
- IEP** Individual Employment Plan

References:

This UK scale is a slight adaption of The Dartmouth Supported Employment Fidelity Scale. Becker, D. R., Swanson, S. J., Bond, G. R., Carlson, L., Flint, L., Smith, G., et al. (2008). Supported Employment Fidelity Scale. Lebanon, NH: Dartmouth Psychiatric Research Center.

FIDELITY ITEM 1

Caseload size

Employment specialists have individual employment caseloads. The maximum active caseload for any full-time employment specialist is 20 or fewer active clients. See the fidelity review manual for a full definition of active clients.

1 Point	Ratio of 41 or more clients per employment specialist
2 Points	Ratio of 31-40 clients per employment specialist
3 Points	Ratio of 26-30 clients per employment specialist
4 Points	Ratio of 21-25 clients per employment specialist
5 Points	Ratio of 20 or fewer clients per employment specialist

Who is counted as active caseload?

- ⊙ A person who receives monthly outreach attempts
- ⊙ A person who receives monthly services from the IPS specialist
- ⊙ A working person who calls the IPS specialist occasionally (less than monthly) to say hello and update the specialist about her job is **not considered** to be on the caseload
- ⊙ A person's IPS case **should be closed after three months without services** or outreach attempts
- ⊙ If a person has been **referred** to an IPS specialist, but has **not met** the specialist yet, that person is **not on the caseload**

FIDELITY ITEM 2

Employment services staff

Employment specialists provide only employment services and do not provide treatment case management services. However, employment specialists may also assist clients to solve a range of employment related personal problems that may be barriers to employment.

1 Point	Employment specialists provide employment services less than 60% of the time
2 Points	Employment specialists provide employment services 60 – 74% of the time
3 Points	Employment specialists provide employment services 75 - 89% of the time
4 Points	Employment specialists provide employment services 90 – 95% of the time
5 Points	Employment specialists provide employment services 96% of the time

FIDELITY ITEM 3

Vocational generalists

Each employment specialist carries out all phases of employment service, including intake, engagement, assessment, job placement, job coaching, and follow-along support before stepping down to less intensive employment support from another MH practitioner and/or peer support. Note: It is not expected that each employment specialist will provide benefits counselling to their clients. Referrals to highly trained benefits counsellors are in keeping with high fidelity (see Item 12).

1 Point	Employment specialist only provides vocational referral service to vendors and other programs
2 Points	Employment specialist maintains caseload but refers clients to other programmes for vocational services
3 Points	Employment specialist provides one to four phases of the employment service (e.g. intake, engagement, assessment, job development, job placement, job coaching, and following along supports)
4 Points	Employment specialist provides five phases of employment service but not the entire service
5 Points	Employment specialist carries out all six phases of employment service (e.g. programme intake, engagement, assessment, job development/job placement, job coaching, and follow-along support)

FIDELITY ITEM 4

Integration of supported employment with treatment through team assignment

Employment specialists are part of up to 2 treatment teams from which at least 90% of the employment specialist's caseload is comprised.

1 Point	Employment specialists are part of a vocational programme that functions separately from the treatment
2 Points	Employment specialists are attached to three or more treatment teams, OR clients are served by individual practitioners who are not organised into teams OR employment specialists are attached to one or two teams from which less than 50% of the employment specialist's caseload is comprised
3 Points	Employment specialists are attached to one or two treatment teams, from which at least 50–74% of the employment specialist's caseload is comprised
4 Points	Employment specialists are attached to one or two treatment teams, from which at least 75 – 89% of the employment specialist's caseload is comprised
5 Points	Employment specialists are attached to one or two treatment teams, from which at least 90 – 100% of the employment specialist's caseload is comprised

FIDELITY ITEM 5

Integration of supported employment with treatment through frequent team member contact

Employment specialists actively participate in weekly “client focused” meetings with the treatment team, (not replaced by administrative meetings), that discuss individual clients and their employment goals with shared decision-making. Employment specialist’s office is in close proximity to (or shared with) their treatment team members. Documentation of treatment and employment services is integrated in a single client record. Employment specialists help the team think about employment for people who haven’t yet been referred to supported employment services.

1 Point	One or none is present	<ul style="list-style-type: none"> • Employment specialist attends weekly client focused meetings with the treatment team. • Employment specialist participates actively in the team meetings with shared decision-making. • Employment services documentation (vocational assessment/profile, employment plan, progress notes) is integrated into the client’s health record. • Employment specialist’s office is in close proximity to (or shared with) the team members. • Employment specialist helps the team think about employment for people who haven’t yet been referred to supported employment services.
2 Points	Two are present	
3 Points	Three are present	
4 Points	Four are present	
5 Points	Five are present	

FIDELITY ITEM 6

Collaboration between employment specialists and key staff members in Government DWP programs and their contractors

Liaison is important to promote sufficient referrals and to obtain assistance with Benefits and other return to work assistance. For instance in the UK this will be Job Centre Plus and Work Programme/Work Choice Providers. The employment specialists and Government funded programme staff have frequent contact for the purposes of identifying potential referrals, discussing shared clients, and obtaining additional assistance.

1 Point	Employment specialists and Government funded programme staff have client-related contacts (phone, e-mail, in person) less than quarterly to discuss shared clients and referrals. OR employment specialists and related programme staff do not communicate
2 Points	Employment specialists and Government funded programme staff have client-related contacts (phone, e-mail, in person) at least quarterly to discuss shared clients and referrals
3 Points	Employment specialists and Government funded programme staff have client-related contacts (phone, e-mail, in person) monthly to discuss shared clients and referrals
4 Points	Employment specialists and Government funded programme staff have scheduled, face-to-face meetings at least quarterly, OR have client-related contacts (phone, e-mail, in person) weekly to discuss shared clients and referrals
5 Points	Employment specialists and Government funded programme staff have scheduled, face-to-face meetings at least monthly and have client-related contacts (phone, e-mail, in person) weekly to discuss shared clients and referrals

FIDELITY ITEM 7

Vocational unit

At least 2 full-time employment specialists and a team leader comprise the employment unit. They have weekly client-based group supervision following the supported employment model in which strategies are identified and job leads are shared. They provide coverage for each other's caseload when needed.

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

FIDELITY ITEM 8

Role of employment supervisor

Supported employment unit is led by a supported employment team leader. Employment specialists' skills are developed and improved through outcome-based supervision. All five key roles of the employment supervisor are present.

1 Point	One or none is present	<ul style="list-style-type: none"> • One full-time equivalent (FTE) supervisor is responsible for no more than 10 employment specialists. The supervisor does not have other supervisory responsibilities. (Supported employment leaders supervising fewer than ten employment specialists, may spend a percentage of time on other supervisory activities on a prorated basis. For example, an employment supervisor responsible for 4 employment specialists may be devoted to supported employment supervision half time). • Supervisor conducts weekly supported employment supervision designed to review client situations and identify new strategies and ideas to help clients in their work lives. • Supervisor communicates with treatment team leaders to ensure that services are integrated, to problem solve programmatic issues (such as referral process, or transfer of follow- along to treatment workers) and to be a champion for the value of work. Attends a meeting for each treatment team on a quarterly basis. • Supervisor accompanies employment specialists, who are new or having difficulty with job development, in the field monthly to improve skills by observing, modelling, and giving feedback on skills, e.g., meeting employers for job development. • Supervisor reviews current client outcomes with employment specialists and sets goals to improve the supported employment service performance at least quarterly
2 Points	Two are present	
3 Points	Three are present	
4 Points	Four are present	
5 Points	Five are present	

FIDELITY ITEM 9

Zero exclusion criteria

All clients interested in working have access to supported employment services, regardless of job readiness factors, substance abuse, symptoms, history of violent behaviour, cognitive impairments, treatment non-adherence, and personal presentation. These apply during supported employment services too. Employment specialists offer to help with another job when one has ended, regardless of the reason that the job ended or number of jobs held. Clients are not screened out formally or informally. See the fidelity review manual for how to score this item when the employment specialist caseload is full and no places are currently available.

1 Point	There is a formal policy to exclude clients due to lack of job readiness (e.g. substance abuse, history of violence, low level of functioning, etc.) by employment staff, case managers, or other practitioners.
2 Points	Most clients are unable to access supported employment services due to perceived lack of job readiness (e.g., substance abuse, history of violence, low level of functioning, etc.)
3 Points	Some clients are unable to access supported employment services due to perceived lack of job readiness (e.g., substance abuse, history of violence, low level of functioning, etc.).
4 Points	No evidence of exclusion, formal or informal. Referrals are not solicited by a wide variety of sources. Employment specialists offer to help with another job when one has ended, regardless of the reason that the job ended or number of jobs held.
5 Points	All clients interested in working have access to supported employment services. Practitioners encourage clients to consider employment, and referrals for supported employment are solicited by many sources. Employment specialists offer to help with another job when one has ended, regardless of the reason that the job ended or number of jobs held.

FIDELITY ITEM 10

The treatment service provider demonstrates a focus on competitive employment

The provider promotes competitive work through multiple strategies. The provider’s initial assessment includes questions about interest in employment. The provider displays written postings (e.g., brochures, bulletin boards, posters) about employment and supported employment services. The focus should be with the provider’s services for adults with severe mental illness or drug and alcohol treatment. The provider supports ways for clients to share work stories with other clients and staff. The provider measures rate of competitive employment and shares this information with Trust leadership and staff.

1 Point	One or none is present	<ul style="list-style-type: none"> • Provider intake includes questions about interest in employment. • Provider includes questions about interest in employment on all annual (or semi-annual assessment or treatment plan reviews). • Provider displays written postings (e.g., brochures, bulletin boards, posters) about working and supported employment services, in lobby and other waiting areas. • Provider supports ways for clients to share work stories with other clients and staff (e.g. provider-wide employment recognition events, in-service training, peer support groups, newsletter articles, invited speakers at client treatment groups, etc.) at least twice a year. • Provider measures rate of competitive employment on at least a quarterly basis and shares outcomes with Trust leadership and staff.
2 Points	Two are present	
3 Points	Three are present	
4 Points	Four are present	
5 Points	Five are present	

FIDELITY ITEM 11

Executive team support for supported employment

Provider executive team members (e.g. CEO/ executive director, chief operating officer, QA director, chief financial officer, clinical director, medical director, human resource director) assist with supported employment implementation and sustainability. All five key components of executive team support must be present for a score of 5.

1 Point	One or none is present	<ul style="list-style-type: none"> Executive director and clinical director demonstrate knowledge regarding the principles of evidence-based supported employment. Provider quality assurance process includes an explicit review of the supported employment programme, or components of the programme, at least every 6 months through the use of the supported employment fidelity scale or until achieving high fidelity, and at least yearly thereafter. Provider quality assurance process uses the results of the fidelity assessment to improve supported employment implementation and sustainability. At least one member of the executive team actively participates at supported employment leadership team meetings (steering committee meetings) that occur at least every six months for high fidelity programmes and at least quarterly for programmes that have not yet achieved high fidelity. Steering committee is defined as a diverse group of stakeholders charged with reviewing fidelity, programme implementation and the service delivery system. Committee develops written action plans aimed at developing or sustaining high fidelity services. The provider CEO/executive director communicates how supported employment services support the mission of the provider and articulates clear and specific goals for supported employment and/or competitive employment to all provider staff during the first six months and at least annually (i.e., supported employment kick-off, all-provider meetings, newsletters, etc). This item is not delegated to another administrator. The IPS service leader shares information about IPS evidence based barriers (difficulties) and facilitators (successes) with the provider executive team (including the CEO) at least twice each year. The executive team helps the service leader identify and implement solutions to barriers.
2 Points	Two are present	
3 Points	Three are present	
4 Points	Four are present	
5 Points	Five are present	

FIDELITY ITEM 12

Work incentives planning

All clients are offered assistance in obtaining comprehensive individualised work incentives planning before starting a new job and assistance accessing work incentives planning thereafter when making decisions about changes in work hours and pay. Work incentives planning includes the impact on all sources of income and fringe benefits (Personal independence payments, travel concession, DLA, Working Tax Credits, Universal Credit etc.) and all costs associated with commencing or changing employment. Clients are provided information and assistance about reporting earnings to any other programme that needs to know the new income details (e.g. Housing, Council Tax, HMRC etc).

1 Point	Work incentives planning is not readily available or easily accessible to most clients served by the IPS service.
2 Points	Employment specialist gives client contact information about where to access information about work incentives planning.
3 Points	Employment specialist discusses with each client changes in benefits based on work status.
4 Points	Employment specialist or other practitioner offers clients assistance in obtaining comprehensive, individualised work incentives planning by a person trained in work incentives planning prior to client starting a job.
5 Points	Employment specialist or other practitioner offer clients assistance in obtaining comprehensive, individualised work incentives planning by a specially trained work incentives planner prior to starting a job. They also facilitate access to work incentives planning when clients need to make decisions about changes in work hours and pay. Clients are provided information and assistance about reporting earnings to DWP, housing programmes, etc. depending on the person's benefits.

FIDELITY ITEM 13

Disclosure

Employment specialists provide clients with accurate information and assist with evaluating their choices to make an informed decision regarding what is revealed to the employer about having a disability.

1 Point	None are present	<ul style="list-style-type: none">• Employment specialists do not require all clients to disclose their psychiatric disability at the work site in order to receive services.
2 Points	One is present	<ul style="list-style-type: none">• Employment specialists offer to discuss with clients the possible costs and benefits (pros and cons) of disclosure at the work site in advance of clients disclosing at the work site. Employment specialists describe how disclosure relates to requesting accommodations and the employment specialist's role communicating with the employer.
3 Points	Two are present	<ul style="list-style-type: none">• Employment specialists discuss specific information to be disclosed (e.g. disclose receiving treatment, or presence of a psychiatric disability, or difficulty with anxiety, or unemployed for a period of time, etc.) and offers examples of what could be said to employers.
4 Points	Three are present	<ul style="list-style-type: none">• Employment specialists discuss disclosure on more than one occasion (e.g. if clients have not found employment after two months or if clients report difficulties on the job.)
5 Points	Four are present	

FIDELITY ITEM 14

Ongoing, work-based vocational assessment

Initial vocational assessment occurs over 2-3 sessions and is updated with information from work experiences in competitive jobs. A vocational profile form that includes information about preferences, experiences, skills, current adjustment, strengths, personal contacts, etc., is upgraded with each new job experience. Aims at problem solving using environmental assessments and consideration of reasonable accommodations. Sources of information include the client, treatment team, clinical records and with the client's permission, information from family members and previous employers.

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

FIDELITY ITEM 15

Rapid job search for competitive job

Initial employment assessment and first face-to-face employer contact by the client or the employment specialist about a competitive job occurs within 30 days (one month) after programme entry.

1 Point	First face-to-face contact with an employer by the client or the employment specialist about a competitive job is on average 271 days or more (>9months) after programme entry.
2 Points	First face-to-face contact with an employer by the client or the employment specialist about a competitive job is on average 151 and 270 days (5-9 months) after programme entry.
3 Points	First face-to-face contact with an employer by the client or the employment specialist about a competitive job is on average between 61 and 150 days (2-5 months) after a programme entry.
4 Points	First face to face contact with an employer by the client or the employment specialist about a competitive job is on average between 31 and 60 days (1-2 months) after programme entry.
5 Points	The programme tracks employer contacts and the first face-to-face contact with an employer by the client or the employment specialist about a competitive job is on average within 30 days (one month) after programme entry.

FIDELITY ITEM 16

Individualised job search

Employment specialists make employer contacts aimed at making a good job match based on client's preferences (relating to what each person enjoys and their personal goals) and needs (including experience, ability, symptoms, health, etc) rather than the job market (i.e., those jobs that are readily available). An individualised job search plan is developed and updated with information from the vocational assessment/profile form and new job/educational experiences.

1 Point	Less than 25% of employer contacts by the employment specialist are based on job choices which reflect client's preferences, strengths, symptoms, etc. rather than the job market.
2 Points	25-49% of employer contacts by the employment specialist are based on job choices which reflect client's preferences, strengths, symptoms, etc. rather than the job market.
3 Points	50-74% of employer contacts by the employment specialist are based on job choices which reflect client's preferences, strengths, symptoms, etc., rather than the job market.
4 Points	75-89% of employer contacts by the employment specialist are based on job choices which reflect client's preferences, strengths, symptoms, etc., rather than the job market and are consistent with the current employment plan.
5 Points	Employment specialists makes employer contacts based on job choices which reflect client's preferences, strengths, symptoms, lessons learned from previous jobs etc., 90-100% of the time rather than the job market and are consistent with the current employment/job search plan. When clients have limited work experience, employment specialists provide information about a range of job options in the community.

FIDELITY ITEM 17

Job development - frequent employer contact

Each employment specialist makes at least 6 face-to-face employer contacts per week on behalf of clients looking for work (rate for each week then calculate average and use the closest scale point). An employer contact is counted even when an employment specialist meets the same employer more than one time in a week, and when the client is present or not present. Client-specific and generic contacts are included. Employment specialists use a weekly tracking form to document employer contacts.

1 Point	Employment specialist makes less than 2 face-to-face employer contacts that are client-specific per week.
2 Points	Employment specialist makes 2 face-to-face employer contacts per week that are client-specific; OR does not have a process for tracking.
3 Points	Employment specialist makes 4 face-to-face employer contacts per week that are client-specific, and uses a tracking form that is reviewed by the supported employment supervisor on a monthly basis.
4 Points	Employment specialist makes 5 face-to-face employer contacts per week that are client-specific, and uses a tracking form that is reviewed by the supported employment supervisor on a weekly basis.
5 Points	Employment specialist makes 6 or more face-to-face employer contacts per week that are client specific, or 2 employer contacts times the number of people looking for work when there are less than 3 people looking for work on their caseload (e.g., new programme). In addition, employment specialist keeps records that can be reviewed by a supervisor on a weekly basis.

FIDELITY ITEM 18

Job development - quality of employer contact

Employment specialists build relationships with employers through multiple visits in person that are planned to learn the needs of the employer, convey what the supported employment programme offers to the employer, describe client strengths that are a good match for the employer (rate for each employment specialist, then calculate average and use the closest scale point).

1 Point	Employment specialist meets employer when helping client to turn in job applications, OR employment specialist rarely makes employer contacts.
2 Points	Employment specialists contacts employer to ask about job openings and then shares these "leads" with clients.
3 Points	Employment specialist follows up on advertised job openings by introducing self, describing programme, and asking employer to interview client.
4 Points	Employment specialist meets with employers in person whether or not there is a job opening, advocates for clients by describing strengths and asks employers to interview clients.
5 Points	Employment specialist builds relationships with employers through multiple visits in person that are planned to learn the needs of the employer, convey what the supported employment programme offers to the employer, describe client strengths that are a good match for the employer.

FIDELITY ITEM 19

Diversity of job types

Employment specialists assist clients in obtaining different types of jobs.

1 Point	Employment specialists assist clients to obtain different types of jobs less than 50% of the time.
2 Points	Employment specialists assist clients to obtain different types of jobs 50-59% of the time.
3 Points	Employment specialists assist clients to obtain different types of jobs 60-69% of the time.
4 Points	Employment specialists assist clients to obtain different types of jobs 70-84% of the time.
5 Points	Employment specialists assist clients to obtain different types of jobs 85-100% of the time.

FIDELITY ITEM 20

Diversity of employers

Employment specialists assist clients in obtaining jobs with different employers.

1 Point	Employment specialists assist clients to obtain jobs with different employers less than 50% of the time.
2 Points	Employment specialists assist clients to obtain jobs with the same employers 50-59% of the time.
3 Points	Employment specialists assist clients to obtain jobs with different employers 60-69% of the time.
4 Points	Employment specialists assist clients to obtain jobs with different employers 70-84% of the time.
5 Points	Employment specialists assist clients to obtain jobs with different employers 85-100% of the time.

FIDELITY ITEM 21

Competitive jobs

Employment specialists provide competitive job options that have permanent status rather than temporary or time-limited status, e.g. transitional employment positions. Competitive jobs pay at least the minimum wage, are jobs that anyone can apply for and are not set aside for people with disabilities. (Seasonal jobs and jobs from temporary agencies that other community members use are counted as competitive jobs)

1 Point	Employment specialists provide options for permanent, competitive jobs less than 64% of the time, OR there are fewer than 10 current jobs.
2 Points	Employment specialists provide options for permanent, competitive jobs about 65-74% of the time.
3 Points	Employment specialists provide options for permanent competitive jobs about 75-84% of the time.
4 Points	Employment specialists provide options for permanent competitive jobs about 85-94% of the time.
5 Points	95% or more competitive jobs held by clients are permanent.

FIDELITY ITEM 22

Individualised follow-along support

Clients receive different types of in-work support that are based on the job, client preferences, work history, needs, etc. Supports are provided by a variety of people, including treatment team members (e.g. medication changes, social skills training, encouragement), family, friends, co-workers (i.e. natural supports), and employment specialist. Employment specialist also provides employer support (e.g. educational information, job accommodations) at client's request. Employment specialist offers help with career development, i.e. assistance with education, a more desirable job, or more preferred job duties.

1 Point	Employment specialist does not meet face-to-face with the client after the first month of starting a job.
2 Points	Employment specialist has face-to-face contact with less than half of the working clients for at least 4 months after starting a job.
3 Points	Employment specialist has face-to-face contact with at least half of the working clients for at least 4 months after starting a job.
4 Points	Employment specialist has face-to-face contact with working clients weekly for the first month after starting a job, and at least monthly for a year or more, on average, after working steadily, and as desired by clients.
5 Points	Employment specialist has face-to-face contact within 1 week before starting a job, within 3 days after starting a job, weekly for the first month, and at least monthly for a year or more, on average, after working steadily and as desired by clients. Clients may be transitioned to intermittent support, or regular monitoring, following steady employment. Employment specialist contacts clients within 3 days of hearing about the job loss.

FIDELITY ITEM 23

Time-unlimited follow-along supports

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

1 Point	Employment specialist does not meet face-to-face with the client after the first month of starting a job.
2 Points	Employment specialist has face-to-face contact with less than half of the working clients for at least 4 months after starting a job.
3 Points	Employment specialist has face-to-face contact with at least half of the working clients for at least 4 months after starting a job.
4 Points	Employment specialist has face-to-face contact with working clients weekly for the first month after starting a job, and at least monthly for a year or more, on average, after working steadily, and as desired by clients.
5 Points	Employment specialist has face-to-face contact within 1 week before starting a job, within 3 days after starting a job, weekly for the first month, and at least monthly for a year or more, on average, after working steadily and as desired by clients. Clients may be transitioned to intermittent support, or regular monitoring, following steady employment. Employment specialist contacts clients within 3 days of hearing about the job loss.

FIDELITY ITEM 24

Community-based services

Employment services such as client engagement, job finding and follow-along supports are provided in natural community settings by all employment specialists. (Rate each employment specialist based upon their total weekly scheduled work hours, then calculate the average and use the closest scale point).

1 Point	Employment specialist spends 30% time or less in the scheduled work hours in the community.
2 Points	Employment specialist spends 30-39% time of total scheduled work hours in the community.
3 Points	Employment specialist spends 40-49% of total scheduled work hours in the community.
4 Points	Employment specialist spends 50-64 % of total scheduled work hours in the community.
5 Points	Employment specialist spends 65% or more of total scheduled work hours in the community.

65% of 37.5 hours per week = 24.5 hours in the community, and 13 hours in the office. That's about 2.7 hours per day.

What counts as community time?

- ⊙ Meeting with clients in community settings, client homes, libraries, parks, coffee shops, restaurants, career profile activities out of the office, etc.
- ⊙ Accompanying clients to job centre appointments, meetings at job centre offices.
- ⊙ Travel time from one work destination to another.
- ⊙ Face to face job development, sitting in on interviews, business tours.
- ⊙ Observing/visiting someone at the job site.
- ⊙ Accompanying someone to an appointment regarding benefits. e.g. Citizens Advice or job centre
- ⊙ Attending a benefits analysis meeting with a client
- ⊙ Meeting with the housing authority on how employment could affect their rent.
- ⊙ Meeting at schools, colleges and local career centres.

What does not count as community time?

- ⊙ Vocational unit meetings in the community
- ⊙ Writing notes in the community
- ⊙ Virtual job development
- ⊙ Client meetings in the office
- ⊙ Treatment team meetings
- ⊙ Meeting with clients in group homes, day programs and other agency offices.

FIDELITY ITEM 25

Assertive engagement and outreach by integrated treatment team

Service termination is not based on missed appointments or fixed time limits. There is systematic documentation of outreach attempts. Engagement and outreach attempts are made by integrated team members. Multiple home/community visits. Coordinated visits by employment specialist with integrated team member. Connect with family, when applicable. Once it is clear that the client no longer wants to work or continue supported employment services, the team stops outreach.

1 Point	Evidence that 2 or less strategies for engagement and outreach are used.	<ul style="list-style-type: none"> • Service termination is not based on missed appointments or fixed time limits. • Systematic documentation of outreach attempts. • Engagement and outreach attempts made by integrated team members. • Multiple home/community visits. • Coordinated visits by employment specialist with integrated team member. • Connect with family, when applicable.
2 Points	Evidence that 3 strategies for engagement and outreach are used.	
3 Points	Evidence that 4 strategies for engagement and outreach is used.	
4 Points	Evidence that all 5 strategies for engagement and outreach is used.	
5 Points	Evidence that all 6 strategies for engagement and outreach are used.	

SCORE SUMMARY

Element	Last fidelity review	This fidelity review	Change in score
Staffing			
1	Number on caseload		
2	Employment services staff		
3	Vocational generalists		
Organisation			
4	Integration with CMHT through team assignment		
5	Integration with CMHT through frequent contact		
6	Collaboration between employment specialists and JC+/WP		
7	Vocational unit		
8	Role of employment supervisor		
9	Zero exclusion criteria		
10	Provider focus on competitive employment		
11	Executive team support		
Services			
12	Work incentives planning		
13	Disclosure		
14	Ongoing, work-based vocational assessment		
15	Rapid search for competitive job		
16	Individualised job search		
17	Job development – frequent employer contact		
18	Job development – quality of employer contacts		
19	Diversity of job types		
20	Diversity of employers		
21	Competitive jobs		
22	Individualised follow-along supports		
23	Time-unlimited follow-along supports		
24	Community-based services		
25	Assertive engagement and outreach by integrated team		
Total score			
Maximum IPS score			

USING DATA TO IMPROVE PERFORMANCE

Breakout activity:

You are the IPS service manager, responsible for overall performance.
In your groups, look at the graph provided

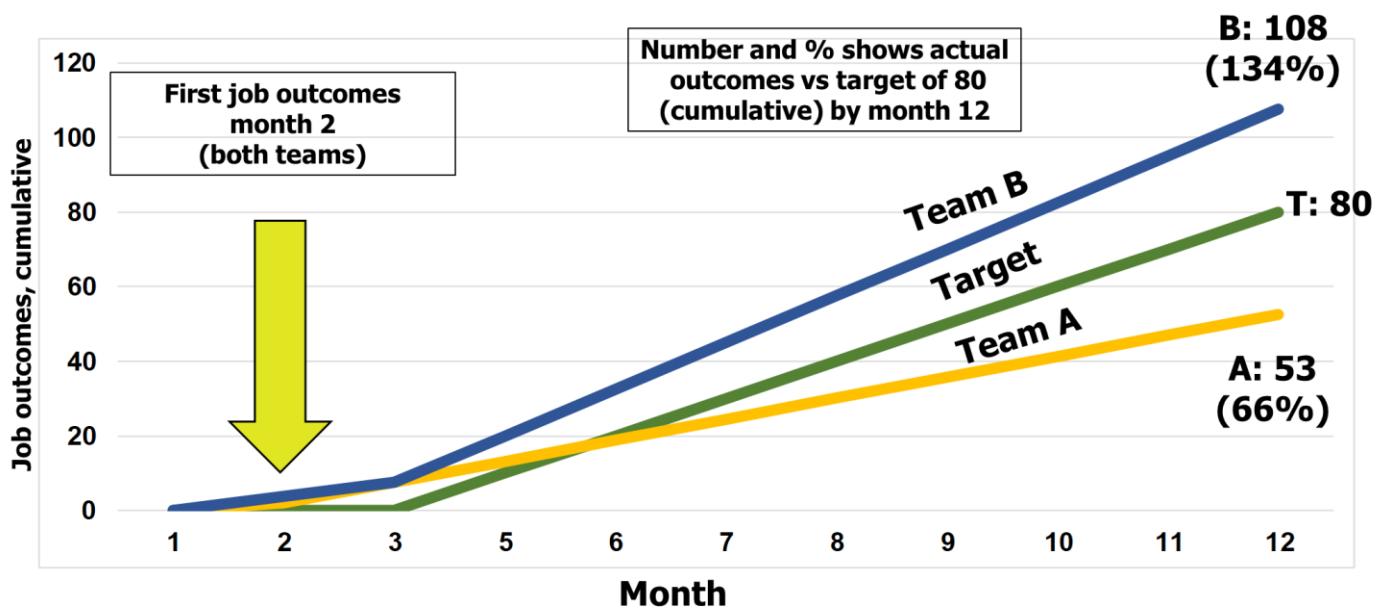
1. What is the graph telling you?
2. What are you going to do about it?

In particular: Consider:

What factors might lie behind team A's performance?

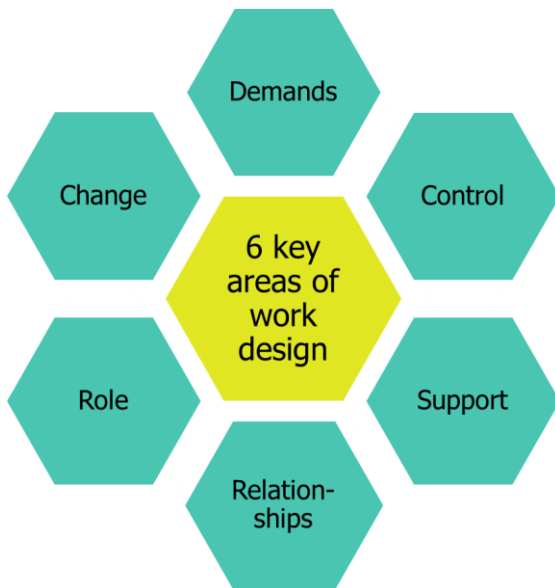
To test your theories:

- What further data would you look at?
- What other actions would you take?



Health and safety executive management standards

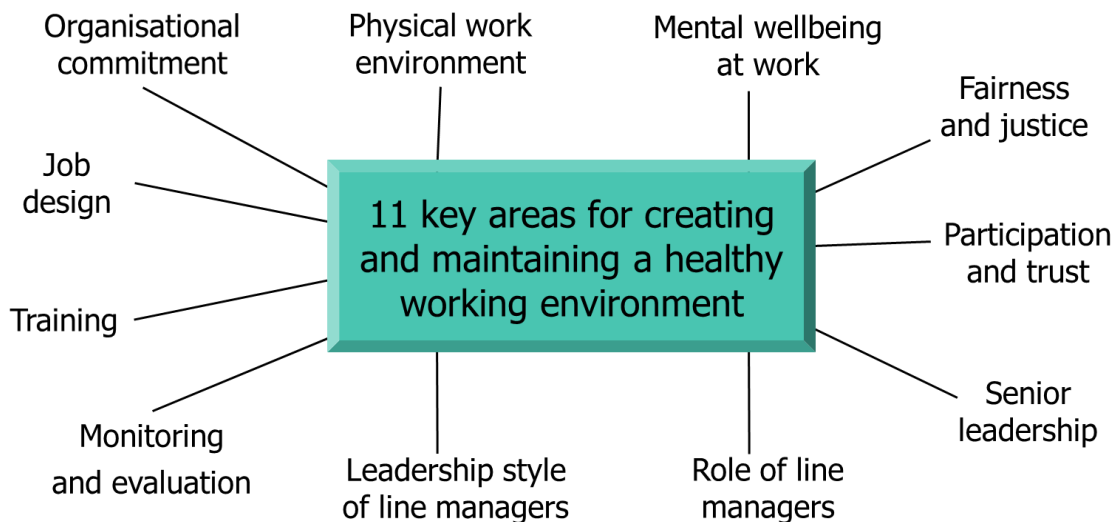
Source: <https://www.hse.gov.uk/stress/standards>



Nice guideline: workplace health: management practices

Source: NICE guideline [NG13]: Workplace health: Management practices.

<https://www.nice.org.uk/guidance/ng13>



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LEADING FOR EXCELLENCE: TRAINING FOR IPS SUPERVISORS COURSE MANUAL

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