

## Statement of Work

### 1. Qualifications, Experience, and Capacity

The mission of Lifelong Adult Education Services, Inc. is to provide quality psychological and educational/training services to people, 16 years and older, who are considered high-risk individuals and whose education and employment goals cannot be attained until they contend with barriers that interfere with success. Lifelong serves individuals who have cognitive deficits, learning disorders, developmental delays, and/or mental/emotional problems. Many of these individuals also have academic weaknesses, have little or no work experience, and/or have linguistic and cultural differences that make it difficult to attain their goals. Some of these individuals may qualify or eventually qualify for Social Security Disability Income (SSDI) or Supplemental Security Income (SSI) because of their significant physical, mental, and/or learning disabilities.

Our comprehensive services to at-risk youth include psychological evaluation, individual and group counseling, behavioral therapy, life skills training, workplace adjustment, case management, job retention support, and specialized instruction. Our services enable high-risk individuals to build self-esteem and develop realistic self-perceptions that lead to personal, academic, and vocational success. Our specific goals are (1) to empower high-risk youth and adults as they receive, perhaps for the first time in their lives, the services they require to progress through their education, job training, and employment activities and (2) to provide guidance and consultation to the other service providers and employers who work with these hard-to-serve individuals.

Since 1993, Lifelong has provided specialized education services to high-risk individuals, 16 years and older, who have floundered not only in traditional academic settings and pre/post-vocational training programs, but also in alternative school and vocational settings intended to meet the special needs of its participants. Our referrals come primarily from public agencies serving the hardest-to-serve individuals who have dropped out, have been terminated, or are participating, but not succeeding in education and employment training activities. The following types of agencies, secondary and post-secondary institutions, and industries refer clients to Lifelong:

- Agencies that serve young people with disabilities, including the School-to-Work-Transition-Program (SWAP) through the Colorado Division of Vocational Rehabilitation, Savio Management Unit, and Denver Options.
- Agencies that serve high-risk youth and adult populations with multiple barriers, including the Mayor's Office of Workforce Development that funds our services for the Temporary Aid to Needy Families program (MOWD-TANF), Arapahoe/Douglas Works TANF Program (A/D Works), and the Denver Human Services Family Counseling Program (FER-FCP).
- College and university disability programs (e.g., Disability Services at the Metropolitan State College of Denver, the University of Colorado at Denver, and the Community College of Denver; the University of Denver).

- Alternative youth and/or adult programs (e.g., the Colorado Department of Education, Youth Opportunities, Youth Biz, ROOTS at Community College of Denver(CCD)-West Campus, The Haven at Fort Logan Mental Health Program, the CCD Special Learning Support Program, Emily Griffith Opportunity School, Denver Options, Goodwill Industries).
- Company training programs offering special education services to 18-21 year old employees participating in workplace literacy, GED preparation, computer literacy, and job-specific training (e.g., Lucent Technologies, Bell Laboratories).

Recent Denver Human Services (DHS) and MOWD statistics, albeit data for a broader age range, provide a general overview of the trends we have noticed, the numbers of at-risk people we have served, the services we have provided, and the outcomes we have helped the participants to achieve. Demand for Lifelong's special education and vocational support services for adults, including recipients between the ages of 18-21, has steadily increased since 1998 when Lifelong was first asked by DHS to provide services to its highest risk TANF clients. Since January of 2001, more than 200 individuals have received psychological evaluations that led to an improved and more realistic employment plan, a more appropriate training venue, and/or an application for SSI and other sources of financial or personal support (other than TANF). Of these, 55% had low IQ's or developmental disabilities and 40% had learning disabilities. Ten percent had concurrent or primary mental illnesses. More than 30% have applied for SSI, with Lifelong's assistance following their evaluations; half of those were approved and the other half is in the appeal process. Our specialized instruction has helped more than 140 people with learning disabilities or other learning disorders to gain their GED, retain employment, or pass courses in programs leading to state certification (e.g., cosmetology, nursing assistant, etc.). Seventy TANF and Welfare-to-Work participants with developmental disabilities or low cognitive abilities participated in instructional services before beginning their job training programs or on-the-job training. Twenty-three of 45 participants whose goal included passing the GED reached that goal, and 20 more have passed three or more of the five GED subtests. Considering that Lifelong's clients are the hardest to serve among TANF participants and that they had all failed in previous programs, these numbers represent significant outcomes. Early identification of learning problems that had previously gone undetected by other providers, formal evaluation of disabilities, specialized instructional services, and consultation with service providers working with the hardest-to-serve participants account for the success Lifelong has had with this population.

*Relevant Staff Knowledge, Skills, and Abilities:* Since 1993, Lifelong staff members have been successfully serving the educational and mental health needs of metro area youth who are referred to Lifelong for specialized instruction and psychological evaluation by youth services agencies. In addition to our comprehensive services, we have developed an administrative system that allows us to coordinate effectively with the agencies, institutions, and companies that contract with us.

The principal owner and founder of Lifelong Adult Education Services, Inc. is Mary Costa, M.A. Since 1980, Ms. Costa has been a coordinator of special programs and instructor for adult education and postsecondary institutions including the Community College of Denver in Denver, Colorado, and the University of the Americas and the National Autonomous University in Mexico City. Ms. Costa has been the Director of Educational Services at Lifelong since 1993. An applied linguist by training, she has expertise in learning problems and disabilities, bilingual education, and workplace literacy. Gary Macdonald, Ph.D., is the Director of Psychological and Disability Services at Lifelong. Dr. Macdonald previously coordinated the learning disability (Special Learning Support Program) and developmental disability (College for Living) program at the Community College of Denver, and joined Ms. Costa full time at Lifelong in 1996. Dr. Macdonald has provided counseling and both psychological and psycho-educational evaluations to clients from a wide variety of referral agencies and individuals along the front range of Colorado and neighboring states. He is widely recognized as an expert in adult learning problems and disabilities that interfere with work, training, or school, and since 1985, has provided both psychological and disability consultation services to local and national organizations.

*Other key staff:* Colleen Kennedy, M.A., our math specialist, has developed math curricula and taught vocation-specific mathematics in classroom and workplace settings for more than 20 years. Ann Johnson, M.A., our primary English and GED/basic skills specialist, is a 30-year community college veteran, who has taught all levels of developmental English, reading, writing, Pre-GED/GED, and basic math to individuals from a wide variety of backgrounds and skill levels. Dixie Wright, our job retention expert, has developed professional development workshops, written textbooks, and facilitated client workshops on specialized work-adjustment, job retention, coaching, and mentoring for work-age youth and adults. David Kalis, our behavioral/life skills therapist, has a background in learning and developmental disabilities. Mr. Kalis's work has benefited numerous Lifelong clients whose deficient intellectual functioning has contributed to their poverty and poorly developed independent living skills. On an as-needed basis, Lifelong hires skilled part-time instructors and therapists whose expertise with the target population and the services and activities that we contract to provide, complement the experience of our core staff.

*Target Population, Service Sites, and Schedules:* This proposal for tutoring, specifically for special education specialized instruction and psychological evaluation services, is intended for any of the 80 young people with disabilities and school histories that reflect a different ability to learn or a difficulty in succeeding in conventional settings. Appropriate referral reasons to Lifelong include: (1) Poor performance in school, training, and work environments, (2) Inconsistent participation or unwillingness to follow through with realistic school or employment activities, (3) Documented or perceived cognitive, emotional, and/or physical disabilities that affect the ability to learn and work, and (4) Poor decision-making, coping, and daily life skills that interfere with interpersonal relationships and communication, health and well-being, and cultural, social, and community interests. Though we would like to see the entire \$100,000 designated for an intensive delivery of special education services for the highest-risk

individuals with learning disabilities, developmental disabilities, low cognitive ability, or mental illness whose problems place them at risk for failure in their WIA Youth Services Programs, we expect that only about a third of these funds will be available. We estimate that we can serve at least eight individual youths at the proposed funding level, and Lifelong could serve more individuals if there is a decision to increase the amount of funding for our services.

Depending on the needs of the individual, the primary program schedule and activities, and the individual's case manager's recommendation, Lifelong can work with individuals at Lifelong's facility, at the primary school site, and/or at the internship and job training site. Individuals often prefer coming to Lifelong's facility because it provides them with a private, discrete, and quiet setting in which to work towards their goals. In cases involving specific learning difficulties at the internship or on-the-job training site, Lifelong staff can work with the individuals and their job coaches/supervisors at the training/job site. Lifelong's specialized tutoring/instruction is customized for the individual, and these services are provided during the hours and the days that best meet the needs of the individuals, the primary program schedule, and the Lifelong specialist assigned to the case.

## **2. Youth Development Tutoring: Special Education Services and Activities**

Within the service element of tutoring, and more specifically, within the category of special education services, Lifelong's specialized instruction and psychological evaluation of cognitive potential and learning ability are two beneficial services to at-risk individuals in the WIA Youth Services Program who need supplemental supportive services (Refer to Exhibit II-C, p \_\_\_ for summary table). Specialized instruction and psychological evaluation, when used appropriately, contribute to better up-front academic/vocational planning, result in ongoing assessment of progress towards goals and goal attainment, and can mean the difference between success and failure for higher-risk individuals at all levels of education, training, and work activity.

**Tutoring: Specialized Instruction for Special Education and Support:** An analysis of agency and institution referrals for Lifelong's specialized instruction over the past four years reveals two persistent trends. First, an unprecedented number of service providers have referred their clients to Lifelong, presumably when instructors at the client's primary education or vocational training sites have lacked the time and expertise to help individuals with special needs. Second, many providers have requested concurrent instructional support, whereby at-risk clients continue their skills instruction at the original training site and attend Lifelong for more specialized instruction in compensatory strategies and accommodation and/or in the content/skill area causing them difficulty. We expect a similar referral pattern for specialized instruction / tutoring for the youth involved in the WIA Youth Services Program. Examples of specialized instruction that fall under the category of special education tutoring are described below.

*Specialized GED preparation, test strategies and accommodations:* Youth Services Program participants, unsuccessful in the traditional GED lab settings, benefit from specialized GED preparation. Community-based GED program instructors and

volunteers tend to make inappropriate instructional decisions because they misjudge the causes for poor performance of youth and adults with hidden disabilities or learning difficulties. These decisions may result in unnecessary delays in completing the GED and inefficient use of money, energy, and time. Lifelong provides pragmatic individualized and small group instruction so individuals can pass GED subtests quickly, and learn to use compensatory strategies and accommodations (for people with disabilities who qualify for test modifications).

*Specialized test preparation for job-related exams or vocational credentials:* Youth Services participants who have repeatedly failed to obtain passing scores on vocational exams that lead to certification, hiring, or upgrades and who have limited time in which to retake and pass the exam to gain/maintain employment benefit from this service. Examples of exams that might necessitate specialized test preparation include the written and manual skills performance exams for the Certified Nursing Assistant license (C.N.A.) and the cosmetology license, the Commercial Driver's license (C.D.L.), credentials for trade apprenticeship programs, and the civil service exams for job entry and upgrades in city, state and federal agencies.

*Specialized Job-Specific Academic Skills and Job Coaching:* Youth Services participants, who lack certain academic/vocational skills, but are already involved in job activities or job-specific certified training programs benefit from customized specialized instruction/tutoring. Needs assessment (e.g., analysis of academic concepts required to do a job or to pass the job- or union-related competency exam) are conducted and possible causes for academic problems are identified (e.g., learning disabilities, developmental disabilities, lack of interest, lack of exposure). The goal is to help participants learn the specific skills they need to perform more competently at work or at their training site. Job-specific instruction in mathematics, for example, might include learning to use a calculator and/or measurement devices, to count or make change accurately, or to use principles of geometry to calculate volumes or dimensions and to read blueprints. Additionally, specialized job coaching at the internship or job site may benefit youth with cognitive deficits, poor decision-making skills, poor problem-solving skills, and under-developed verbal cognitive abilities. Specialized job coaching, which combines cognitive/behavioral training, therapeutic work-adjustment, and life skills training, emphasizes here-and-now events and actual tasks to be accomplished, and this approach works well with individuals who have special needs.

*Specialized pre-employment literacy and communication skills:* Youth participants in any pre-employment training program who experience language-based problems or skill deficits and need work-adjustment training because of poor or limited work histories receive specialized instruction in ESL, math, writing, reading, communication, and job retention skills. This intentionally redundant supplement to the individual's primary academic program allows us to help the individual build sight-word vocabulary and basic language skills as we rehearse the common words/phrases, skills/competencies and behaviors required for a specific job.

**Performance Benchmarks, and Outcomes for Tutoring: Specialized Instruction for Special Education and Support:** We estimate that any of the 80 identified Youth Services participants may be referred by their case managers for specialized instruction during 2004-2005, and that the actual number of clients we serve will depend on availability of funding. Each client-specific performance benchmark for specialized instruction reflects the most time-efficient and cost-effective path to goal completion while accounting for the client's unique needs, abilities, and performance or learning difficulties as identified by the client, by service providers, and by the results/recommendations section of a psychological evaluation report. Ongoing assessment of client performance goals and progress permits each client to recognize short-term goal attainment and to develop more realistic long-term academic and employment goals. A typical client with mild to moderate special needs, for example, uses an average of 80 hours of specialized instruction/tutoring to attain realistic performance benchmarks. Benchmark and short-term outcome data will be tracked and reported to MOWD monthly so that MOWD can decide whether to continue or terminate specialized instruction services (Please refer to II-C Projections, p. \_\_). Long-term outcome data from sources such as MOWD and D.V.R. strongly suggest that Lifelong services do contribute to the individual's ability to seek and retain employment and to maintain self-sufficiency.

**Tutoring - Special Education Support: Evaluation of cognitive potential and learning ability with feedback:**

In 1999, the Office of Civil Rights (OCR) provided guidance that specifically called for five areas of service provision to TANF clients, and participants in the WIA Youth Service Program face similar challenges, making the OCR recommendations applicable in this service context as well. The OCR suggested to agencies serving TANF clients that (1) screening for learning and other disabilities needed to occur for all TANF applicants, and that (2) a thorough evaluation by a qualified professional needed to happen for those who were suspected of having learning problems. The OCR further recommended that the (3) appropriate training of staff and consultation regarding accommodations for the (4) TANF participant and his or her (5) potential employer needed to be available. Lifelong's services satisfy the OCR's recommendations for service provision to the clients at greatest risk. In addition, the psychological evaluation service has been proposed, since the success of many of the tutoring/specialized instruction services outlined in this proposal depend upon access to current and appropriate psychological evaluation data and recommendations.

The evaluation process includes the administration of psychological tests and diagnostic tools, a review of previous documentation, and a report with feedback detailing results and recommendations. Evaluation is appropriate when the young person's abilities, skills, and cognitive and vocational potential are unknown/unclear, when there are barriers to academic achievement or job training and placement, and when the client's learning and work histories indicate prior difficulties. In-depth psychological and psycho-educational evaluations identify client abilities, skills, and cognitive potential, and reveal client barriers to job training, employment, and job retention. The following psychological and psycho-educational tests and test batteries comprise the core battery

typically administered to people who are seventeen years or older: the Wechsler Adult Intelligence Scale-Third Edition, the Wechsler Memory Scales, The Minnesota Multiphasic Personality Inventory (MMPI-2), the Woodcock-Johnson Psycho-Educational Battery-Third Edition, an adaptive behavior scale, and the Brown Attention Deficit Disorder Scales.

Selection of tests depends on referral reasons and client needs revealed during the testing process. Each of these tests or test batteries yields information relevant to vocational potential or expected levels of attainment, and each is useful in directing clients toward the most appropriate vocational goals. Within the limits of the confidentiality requirements imposed by both the ethical standards of psychologists and state law, every aspect of the evaluation feedback process is a collaborative effort aimed at enhancing wise decision-making and improving the client's quality of life and employability. The results and recommendations in the written report of the psychological and/or psycho-educational evaluations are verbally explained to the client and/or case manager as part of the feedback process. As appropriate, results of the evaluation may be shared with other providers of vocational training and educational services who are interested in the success of their clients with special needs. Attachment 1 (page 42) contains actual evaluations of two MOWD-TANF clients referred for evaluation.

**Performance Goal and Outcomes for Evaluation:** Approximately eight Youth Services participants with special needs, who do not have appropriate documentation of disabilities and barriers to success, will be referred to Lifelong for psychological evaluation services during this contract. The specific outcome of this service is the final written report generated from our analysis of test results. The individual's case manager and other service providers involved in the young person's ISS Development plan are strongly encouraged to use the recommendations provided by psychological reports to supplement the data they normally use to help their clients attain their academic goals and obtain/retain employment.

*Collaborative Partnerships:* Lifelong has been successful with higher risk populations because we actively coordinate with other service providers to help clients use their existing services wisely and to help them become more self-sufficient and independent. Our collaborative efforts have facilitated improvements in coordination and communication among service providers, better decision-making, case management, tracking, and activity/program transitions, greater emphasis on individualized hands-on training at the job site for clients who have histories of poor work performance, learning problems, and limited/no success in classroom, and earlier identification and referral for evaluation of at-risk clients. Our services are intended to supplement the efforts of other providers so we have worked conscientiously to develop and maintain successful relationships with professionals at academic institutions and at federal, state, and local agencies who provide or arrange for secondary and alternative education, post-secondary education, vocational training and employment. When necessary, we facilitate staffings that include the client and all current providers to review or identify expectations, responsibilities, goals, time lines, and barriers to success. Since most of our clients have multiple needs that must be addressed along with their academic and vocational goals,

Lifelong regularly makes referrals to and collaborates with programs providing access to free/sliding scale medical and mental health care provision, food, housing, and child care. We often use our contacts within organizations to facilitate the client's transition to other counties/agencies in the event the client moves to another county or becomes ineligible for the program under contract. Lifelong has developed an extensive referral network throughout the metro area, and we actively work toward building productive relationships with new professionals and agencies whose services we can supplement.

Service providers in the MOWD network seem to respect our work, and this respect may explain the steady flow of referrals to our Lifelong. We have provided psychological and educational services to clients attending Genesis Jobs, Inc., Curtis Park Community Center, Rocky Mountain SER, GANAS, and Servicios de la Raza. More importantly, we have successfully collaborated with Emily Griffith Opportunity School, Mi Casa Avenidas Project, Shalom Denver, Work Options for Women, Bayaud Industries, Center for Women's Employment and Education (CWEE), the Community College of Denver's Workplace Essentials Program and TEC-East Campus, and Warren Village. We intend to continue to foster these service provision relationships, and look forward to building equally successful collaborations with WIA Youth Services contractors that are new to the MOWD service delivery system.

### **3. Performance Benchmarks and Outcomes**

Three factors must be addressed to help young people with special needs remain in school, in training, or in suitable work (with potential for wage increases and job upgrades). First, there must be an appropriate match between the client's abilities and the academic program, vocational training program, or entry-level job. Second, adequate opportunities must be available for clients to learn, practice, and receive feedback in their current academic, vocational, or 'new employee training situations. Finally, future opportunities that are realistic and appropriate must be made available to young people with disabilities or who are slower learners. In this opportunity to work with some of the WIA Youth Services participants, we can raise their awareness about building upon academic and vocational success by selecting appropriate and realistic goals and about ways to positively address workplace disability issues with their employers well before they are employed and in need of accommodation.

For some youth who have the cognitive ability and who have learned to use compensatory strategies and accommodation effectively, post-secondary academic and vocational training programs are reasonable long-term outcomes. For youth who will always struggle in traditional classroom settings, additional job skills training at the workplace or in a hands-on vocational training program are more likely avenues for developing work skills. For young people with disabilities who are or will be employees with disabilities, concerns about job retention, future job training, and job upgrades/promotions must taken into account reasonable accommodation in the workplace; the Americans with Disabilities Act of 1990 mandates that an employer must provide reasonable accommodation if the person is otherwise qualified for the job. Self-

awareness and familiarity with reasonable accommodation are important long-term survival strategies for youth and adults with disabilities.

*Communicating and monitoring ongoing and final program outcomes with MOWD:* Lifelong is capable of client tracking and can report to MOWD on the status of active clients using the forms or procedures required. We have recently been given access to MOWD’s MIS and Job Link tracking system via a remote dial-up connection from our computers, and our staff participates in periodic technical training to use this system effectively. Lifelong staff regularly communicates both internally and externally via e-mail and uses other technology regularly in its office practices. Short-term performance benchmarks will be monitored and reported monthly to MOWD. Progress reports will be submitted to the primary case managers who coordinate each young person’s ISS Development plan. Additionally, while efforts will be made to document long-term WIA goal attainment for clients after they complete their activities at Lifelong; our ability to know about clients after they stop working with us depends on the primary case manager’s (or our contract specialist’s) ability to share outcomes with us. The following table displays the types of data that will be used to track client success in each proposed activity:

SERVICE	FREQUENCY	TYPE OF DATA REPORTED
Tutoring / Specialized Instruction	30 days  60/90/120 days	Hours attended Progress made toward ISS tutoring goals Goal completion (e.g., GED, skills improvement, program/job retention, etc.)
Tutoring / Psychological Evaluation	30 days	Completion of evaluation process Client attendance Recommendations

*Case File Management:* Individual case files contain biographical information, relevant assessment information from current and previous service providers, and detailed case management notes. Contact hours, attendance, progress reports, samples of client work, special testing applications, requests for accommodation, and other relevant data are kept in each file. Individual client and their case files are assigned to specific Lifelong staff upon referral and the individuals and their files are tracked by the primary staff member responsible for providing the services. All clients must meet with a Lifelong staff member for their initial intake for services, and every client must sign the mandatory disclosure statement required by the State of Colorado that details grievance procedures, client rights, and limits of confidentiality. According to state laws and the professional, legal, and ethical standards of psychologists and practitioners in related fields, all files must remain confidential unless the client provides written permission for release of this information. Arrangements will be made with program monitors so that they can evaluate Lifelong’s record keeping system within the state defined legal requirements for confidentiality. Program and service delivery shortfalls will be addressed as they occur. Because our services are highly customized to the needs of each participant, reduced or declining referrals or attendance will signify that some change in service delivery is necessary. Engagement of clients and their other service providers in the feedback and evaluation of our services also ensures quality services and satisfied consumers.

**4. Cost and Cost Effectiveness**

All of Lifelong’s services are provided to agencies and individuals on the same fee-for-service basis, and it is understood that Lifelong is not guaranteed these referrals under any contract with MOWD. As a private company, the rates for services we provide are determined by market analyses, but the fee structure was developed primarily to satisfy the requirements of the Colorado Division of Vocational Rehabilitation (DVR) for the services it purchases from vendors. The formulas used by the Colorado Division of Vocational Rehabilitation are based on CPT codes and conversion factors borrowed from the insurance industry. To encourage referrals from rehabilitation counselors and to make our services affordable to our individual clients, our rates have been set competitively below the maximum rates set by that agency. We do not charge different rates to different agencies or individuals unless a prior contract has fixed the fees we charge below the levels of the current fee structure (i.e., if a contractual agreement pre-dates changes to the fee requirements of the Colorado Division of Vocational Rehabilitation). We are requesting no separate administrative reimbursement. The projected cost of services is provided in the following chart:

**Service, Units of Service, Cost p/Unit, Number of Participants, Projected Cost p/Person, & Total Annual Cost**

<i>Service</i>	<i>Unit of Service</i>	<i>Cost per Unit</i>	<i>Number of Participants</i>	<i>Units per Client</i>	<i>Cost per Participant</i>	<i>Total Units</i>	<i>Annual Cost</i>
Tutoring: Specialized Instruction	One hour		8	80		640	
Tutoring: Formal LD/Cognitive/Mental Health Evaluation for participants lacking appropriate documentation of needs	Evaluation plus report		8	1		10	
Document processing fee assessed by school districts when special education records are requested.	One page		8	20 pages (average)		160 pages	
<b>TOTAL</b>							

*Accounting, Billing, and Record-keeping System:* Lifelong Adult Education Services, Inc. is a fee-for-service provider of services. Our accounting system is set up accordingly using the “cost” or cash accounting method. Each service we provide must support itself in terms of the revenues generated and the billing/invoicing that occurs each month must support all salaries and administrative costs incurred.