November 30, 2016

Dear \*\*\*\*\*\*:

This letter is to help you prepare for your upcoming fidelity review that is scheduled for \*\*\*\*\*\*\*\*\*. Included in this letter is a list of documents, meetings, and information that will be observed during the review of your organizations Individual Placement and Support (IPS) program. In an attempt to maximize our time and ensure we are providing a quality service for you/your organization, we ask that the agenda provided closely align with the meetings scheduled and that the flow of the agenda outline is not compromised.

During the visit, we will need access to the documents listed below. It is very possible that you may have this information in a different form that will also be acceptable.

**\*Please note that all data and information taken into consideration during our visit will include but not be limited to one calendar year prior to the review.\***

* List of IPS supported employment staff and assigned caseloads to include number of active and inactive individuals.
* List(s) of businesses where individuals are currently working, including job titles, start date and the name of the business. In addition, job end dates if applicable.
* IPS marketing tools i.e. Brochures, flyers, etc… available to individuals that come to your agency seeking employment services.
* Job Development documentation, to include businesses contacted, what types of jobs were being developed and frequency. Types of contacts (face to face, media, telephone, with individuals or without).
* Documentation indicating location of service provision by ES.
* Any/All IPS program data collected.

Activities/Interviews/Observations that will be included in the two day visit are as follows:

* Meet with the IPS Supervisor or others selected by the agency for a brief introduction/ orientation to the agency.
* Observe IPS supported employment group supervision meeting.
* Observe a mental health treatment team meeting.
* Interviews with agency executive leadership such as CEO, QA Director and Clinical Director.
* Shadow Employment Specialist (ES) during the job development process (if possible two different ES would be beneficial to compare styles and relationship building techniques).
* Interview clinical staff.
* Interview ES to gather additional information not observed in shadowing process.
* Interview a small group of individuals (3-5) that are receiving supported employment services.
* Interview significant others/family members of individuals that are receiving services.
* Review clinical charts of individuals that have received IPS services (please include those in different phases of the process). Reviewers should also have access to charts of consumers interviewed.
* Interview MRS counselors as applicable that work with a supported employment caseload.
* Interview IPS Supervisor
* Interview benefits counselor (if one is employed).

Please share this information with your organization, leadership, clinical staff and or providers at the sites we will be visiting. We recognize that having an external review can be stressful. However, we would like to remind everyone participating in the visit that our goal in completing the review and providing feedback is to help improve and support adherence to the fidelity model which evidence supports improves outcomes!

Thank you in advance for your hospitality and assistance with setting up our schedule as well as arranging for all the documentation to be available on the day we arrive.

If you have any questions regarding the information in this letter please feel free to contact me.

Please find attached a sample agenda document.

Sincerely,