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National Disability Policy Review
Meeting of Work Group Convenors
May 9, 1995
3:30 - 5:00 p.m.

AGENDA

I. Overview of Meeting Agenda (3:30-3:40)

Diana will outline the plan for next full team meeting on May 31:

- o Presentations of findings by work groups on Adult Employment and School-to-Work Transition
- o 5 minutes of best practices at beginning and end of meeting; goal is to promote interagency collaboration

II. Reports from work groups:

- o Each convenor will give a 5-minute overview of their work group's progress to date, including a statement about when findings and recommendations will be ready to present to the full team
- o 5 minutes of discussion by convenors as to whether work group is going in the right direction

A. Children: Judy Feder

Decision: Do we agree that working to coordinate services better is where the groups should focus? (3:40-3:50)

We will interrupt the agenda around this time because Elaine Kamarck will stop by the meeting. We will briefly discuss the impact of NPR/Rego2 on disability issues, and the relationship of the NPR review to the disability policy review. (3:50 - 4:00)

B. School to Work: Judy Heumann (4:00-4:10)

C. Accommodations: Liz Savage (4:10-4:20)

D. Adult Employment: Susan Daniels

Decision: Are the group's emerging "New Covenant" options heading in the right direction? What steps must we take to ensure a good outcome? (4:20-4:40)

III. Short-term issues (including children's SSI, changes to vocational rehabilitation, reauthorization of IDEA, response on ADA backlash)

IV. Next Steps

File
MDPH

WHITE HOUSE DISABILITY POLICY REVIEW

CHILDREN'S WORK GROUP

Proposed Outline for Report on Integrated Services

Background

The Children's Work Group met weekly from approximately January through March. In April, we started meeting on alternate weeks; on the weeks in between, a "Steering Committee" met to explore ways to guide the group to some purposeful consensus.

Early on, the larger group divided into three subgroups -- Income Supports (mostly SSI, also AFDC), Education (mostly Parts B and H of IDEA), and Health (Medicaid and PHS programs).

In the larger group, we've met with advocates and shared information with each other on our areas of expertise. The information sharing has been accomplished through briefings by group members, or by other experts from the agencies represented. For example, Rachel Block of the HCFA Medicaid Bureau briefed the group on Medicaid waivers, Judy Wertz of OSERS discussed the IDEA reauthorization, and Judy Chesser presented on SSI reform.

Through periodic subgroup meetings and the ongoing discussions of the larger group and the steering committee, we have arrived at a crossroads. We've made some tentative decisions.

1. *"We do the same thing! How can we simplify this so families don't have to go through it twice, states don't have to set up two systems, and the federal government doesn't have to pay for the same service provided by two different systems?"*

The natural focus of most of our discussions is on how to coordinate programs, eliminate duplication, make services and programs as family-friendly as possible -- especially involving families in decision making and service delivery, and streamline systems and eliminate bureaucratic red tape. We seem to have arrived at a decision to recommend some short and long-term activities aimed at coordinating services.

2. *It's time for the Children's Group to synthesize all the input, discussions, presentations and analytical thinking and make some long and short range recommendations.*

While we would support the continuation of the group as an information sharing, networking entity, group members are moving toward a need for some synthesis and recommendations. Furthermore, representatives of the advocacy and consumer groups are beginning to ask for some analysis and ideas. **Our proposed solution is to develop a synthesis report for the White House Disability Policy Review on**

coordinated services. The report will include recommendations -- all within the context of coordinating services and making them more family friendly. The recommendations will range from "tinkering" with individual programs to establishing a major demonstration program. Ideally, this report will represent our combined federal thinking on statutory and regulatory and agency guidance reforms to make government policy related to disabilities smarter and more smoothly coordinated. We envision this report serving as a blueprint, or a template, against which to hold future proposed reforms in programs that affect children with disabilities.

The steering committee developed the following outline for the paper. It will be discussed by the full group on Monday, May 15.

Outline for Coordinated Services Report

I. Background on Federal Programs Serving Children with Disabilities

A. Introduction

1. Multiple targeted programs supported by federal government.
2. Also multiple "generic" programs that serve all kids, including those with disabilities.
3. Historical perspective: how and why programs developed.
 - a. fragmentation today because existing programs were "tweaked" to accommodate social change; no specific principles or policies regarding children with disabilities to guide and coordinate program evolution.
 - b. lack of coordination across programs; in some cases, contradictory policies and rules.
 - c. program changes were and are made in discrete "spheres."
 - d. we are now living in a more mature environment with different constraints and demands.
 - e. family policy and disability policy is not static.
 - f. we need to make best use of limited and shrinking resources.
 - g. need to make best use of families, without exhausting them.

B. Education Programs

1. IDEA

- a. Part B
 - i. describe program
 - ii. historical development

iii. spending and utilization

b. Part H

2. Chapter 1 (same outline for all background sections)

3. Others?

C. Health Programs

1. Medicaid

a. State Plan Services

b. EPSDT

c. Waivers (1915(b) and (c))

d. 1115 waivers

2. Public Health Service

a. MCH

3. Others

D. Income Supports

1. SSI

2. AFDC

3. Others?

II. Coordination of Programs

A. What we mean by coordination.

B. Goals of coordination

C. Is it possible?

III. Case Studies of Coordination (try to include examples of state, local, urban, rural, school based, Medicaid centered, private insurance?, income and family support)

- A. Coordination is not a "blue sky" unworkable idea -- it is done in some places.
- B. Many of the pieces are available under existing federal authorities. This section offers some examples of how the pieces can be creatively put together to create a coordinated system.
- C. School system that uses Medicaid (Baltimore County or Oklahoma)
- D. Medicaid Waiver program that pulls it together
 - 1. Wisconsin COP
 - 2. DC proposed 1115
- E. San Diego schools
- F. Model family support programs
- G. A Part H example?

IV. Characteristics of Successful Collaborative Systems

- A.
- B.
- C.

V. Barriers: Why it doesn't happen more often

- A. Program specific barriers
 - 1. Education
 - 2. Health
 - 3. Income Support
- B. Program Interaction Issues

1. Payor of last resort
2. Philosophical differences between systems
3. Flexibility vs. federal prescription
4. increased poverty and disability leading to shrinking resources
5. lack of support services ("glue money")

VI. Federal Policies to Encourage Collaboration (Long and Short Range Recommendations)

Note: this is the least fleshed out section so far, since the group felt some need to: (1) get a go ahead from agency heads and the White House; and (2) begin writing the previous sections.

- A. Principles for all long and short range recommendations
- B. We are not proposing block grants; we are proposing recommendations that simplify and encourage imagination and creativity.
- C. Individual program reforms
- D. Ideas for encouraging coordination
 1. 1115 demonstrations on multiple systems
 2. other large and small demonstrations
 3. tinkering with cross cutting pieces
 - a. uniform assessment for multiple programs
 - b. coordinating case management
 - c. ?

AGENDA
Meeting of Work Group Convenors
National Disability Policy Review

March 30, 1995

1. Finish Guiding Principles
2. Notice of meeting with Doug Ross
3. Discussion of where the policy review is heading
4. Timing
5. How to use the time of the full group in the next 2-3 months

As President Clinton has stated, "Having a disability does not diminish one's right to participate in all aspects of mainstream society." In the United States, it is estimated that:

One in five Americans (43 million) experiences a disability;

One in ten Americans (25 million) is temporarily disabled at any given time;

Nearly one in three Americans over age 65 (11.2 Million) has a disability; and,

African Americans, Hispanic Americans, Native Americans, and low income Americans are more likely to have a disability. *Asian Americans*

Everyday in our country persons with disabilities are exceeding the expectations which our society has set for them. In doing so, individuals with disabilities are redefining what it means to be a fully participating member of the American community.

Indeed, Americans with disabilities and their families often are in the vanguard of those calling for a New Covenant with their government. They no longer want to be taken care of by anyone, least of all government. Instead, they expect government at every level to work alongside them to strengthen policies and programs which increase their personal and economic independence while removing barriers which continue to infringe upon their rights and abilities to lead responsible, productive lives.

Accordingly, President Clinton has directed his Administration to take the lead in "craft(ing) policies of inclusion, independence and empowerment that will inspire positive changes in this country and in nations around the world". The purpose of this comprehensive Policy Review, therefore, is to carry out the President's charge by:

- o Analyzing how Federal policies and programs currently affect Americans with disabilities and their families; and,

- o Recommending ways to craft a more coherent and consistent set of policies which will result in the greater inclusion, independence and empowerment of all people with disabilities in our nation.

The principles that guide this analysis and inform its recommendations must be rooted in the same ideals that underpin the rights and responsibilities of all Americans. We, therefore, believe it is in the National interest that federal policies, programs, benefits and activities affecting individuals with disabilities be designed and implemented to:

- o End discrimination against Americans with disabilities of all ages, genders, ethnic backgrounds and income levels in education,

employment, housing, public accommodations, transportation, communication, recreation, institutionalization, health services, voting, access to public services and other areas through the full enforcement of all civil rights laws and the Constitution.

- o Foster equal opportunity, independence and the full participation and economic self-sufficiency of every member of the public, including persons with disabilities, in all programs and activities of the Federal Government.

- o Take effective steps to remedy the links and inequities based upon disability, minority status, and poverty in our country.

- o Create universal access to the National Information Infrastructure and other vital emerging technologies.

- o Affirm and support the efforts of families with children with disabilities to raise their sons and daughters at home and to include them in every facet of family and community life.

- o Maximize the ability and opportunity of all individuals, regardless of the level of their disability or age, to live in the community as full, participating members of their families.

- o Assure that assistance or services provided to people with disabilities is carried out in a manner consistent with their strengths, resources, priorities, concerns, and abilities.

- o Afford States and local governments flexibility in delivering community services, provided that people with disabilities and their families have a lead role in designing, overseeing and evaluating those services which affects them most.

- o Stimulate public-private partnerships which demonstrate and disseminate new ideas, knowledge and practices that promote the inclusion of all people with disabilities in their homes, in public schools, in the workplace and in all aspects of community life.

- o Make it pay for such individuals to work by creating incentives rather than disincentives to work and to pursue careers.

Our Nation's greatness rests with its people's potential to make the most of their lives and thereby shape the future of our country. Americans with disabilities represent an enormous reservoir of such potential. To tap this potential and power, we must heed the President's urgent call to action:

"We must not rest until America has a national disability policy based on three simple creeds: inclusion, not exclusion; independence, not dependence; and empowerment, not paternalism." Bill Clinton, 1992

THE WHITE HOUSE

WASHINGTON

MEMORANDUM FROM THE WHITE HOUSE DOMESTIC POLICY COUNCIL

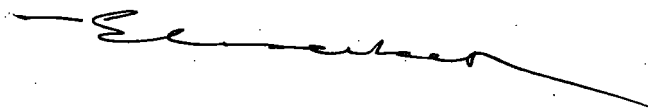
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thought you might want
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THE WHITE HOUSE
WASHINGTON

February 14, 1995

Dear Colleague:

You are cordially invited to attend a meeting with work group leaders of the National Disability Policy Review. The meeting will be held on **Thursday, February 16, 1995, 12:30-2:00 p.m. in room 248 of the Old Executive Office Building.**

Last fall, the Administration convened a team of Federal officials to conduct a National Disability Policy Review of Federal programs serving people with disabilities. This Review is headed by Carol H. Rasco, Assistant to the President for Domestic Policy, and Alice Rivlin, Director, Office of Management and Budget.

The Review Team established five work groups: Guiding Principles, Accommodations, Children's Issues, School-to-Work Transitions, and Employment of Working-Age Adults. These groups have been meeting to determine the direction of, and next steps for, national disability policy.

We would appreciate the opportunity to update you on the progress of the Review's work to date and receive your suggestions. In particular, we would like your input on the attached draft of the Guiding Principles statement that will serve as a framework for the direction of the Review's work.

Your ideas, concerns, and solutions will be critical to the overall process of this review and we look forward to working with you.

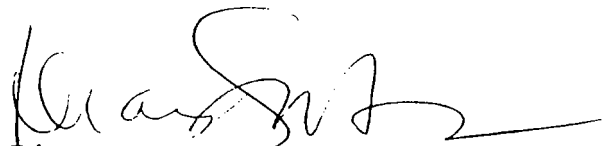
Please contact Elisabeth Cohen (phone: 456-5571) to provide clearance information (date of birth). Also, feel free to forward this invitation to the appropriate representative at your organization if necessary. We apologize for the short notice and hope you will be able to attend.

Thank you.



Lynn Margherio
Senior Policy Analyst
Domestic Policy Council

Sincerely,



Diana Fortuna
Senior Policy Analyst
Domestic Policy Council

THE WHITE HOUSE

WASHINGTON

MEMORANDUM FROM THE WHITE HOUSE DOMESTIC POLICY COUNCIL

Distribution:

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THE WHITE HOUSE

WASHINGTON

February 14, 1995

Dear Colleague:

You are cordially invited to attend a meeting with work group leaders of the National Disability Policy Review. The meeting will be held on **Tuesday, February 21, 1995, 11:00-12:30 p.m.** in room 248 of the Old Executive Office Building.

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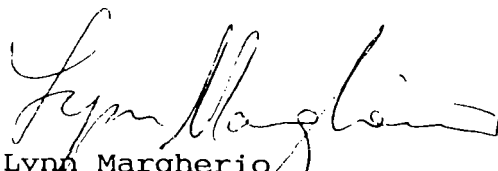
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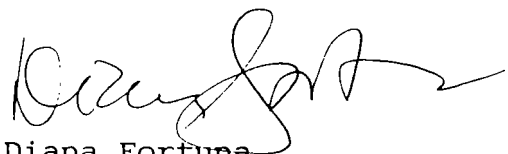
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Domestic Policy Council

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Diana Fortuna
Senior Policy Analyst
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National Disability Policy Review
Guiding Principles
D R A F T

DRAFT

The fundamental role of governments in respect to individuals with disabilities should be to assure the right of such persons to enjoy full inclusion and integration in the educational, economic, political, social, and cultural mainstream of American society. In practical terms, therefore, governments must assure that people with disabilities of all ages, ethnic backgrounds, and income levels have the equal opportunity to exercise their full rights and responsibilities to live as independently as possible; to enjoy self-determination; to make choices; and, to be productive throughout their lives. It is, therefore, in the nation's interest that public policies, programs, benefits, and activities affecting such individuals be designed and implemented to:

- o End discrimination against Americans with disabilities and strengthen our nation's communities and economy by providing strong, effective, and fair enforcement of the Americans with Disabilities Act, Title V of the Rehabilitation Act, the Fair Housing Act Amendments, and the Individuals with Disabilities Education Act.
- o Strengthen the capacities of such persons and assure that needed services and supports are provided in a coordinated fashion which maximizes their control over their own lives and futures in the mainstream of American life.
- o Assure that any assistance provided to such a person is carried out in an individualized manner, consistent with the unique strengths, resources, priorities, concerns, choices, abilities, and capabilities of that individual.
- o Support the efforts of families with children with disabilities to raise their sons and daughters at home and to include them in every facet of family and community life.
- o Assist individuals with disabilities of all ages, including those 65 and older, to play valued roles as participating members of their families and communities.
- o Expand the ability and flexibility of states and local governments to work directly with people with disabilities and their families to fashion more effective and responsive solutions to the challenges we face as a nation.
- o Improve access to the assistance, technology, and supports that enable these individuals to have greater control over their lives and contribute more fully to their home, family, school, work, and community life.
- o Assure that all current and future programs and activities are designed and implemented to meet the needs of those eligible members of the public who have disabilities.
- o Make it pay for such citizens to work by creating incentives rather than disincentives to work and to pursue careers.

THE WHITE HOUSE

WASHINGTON

NATIONAL DISABILITY POLICY REVIEW

Meeting of the Review Team
February 22, 1995
Room 248, Old Executive Office Building

AGENDA

Welcome and Introduction Carol H. Rasco and Alice Rivlin

Review of Guiding Principles Bob Williams, Diana Fortuna and
Draft and Advocacy Groups' Lynn Margherio
Comments

Update on Work Group Efforts:

o	Adult Employment	Susan Daniels
o	School-to-Work	Judy Heumann
o	Accommodations	Liz Savage
o	Childhood	Judy Feder/ Ruth Katz

Status of Program Inventory Lisa Fairhall and Richard Green

National Disability Policy Review
Guiding Principles
D R A F T

DRAFT

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**ATTENDANCE LIST FOR NATIONAL DISABILITY POLICY REVIEW MEETINGS
WITH ADVOCACY GROUPS TO DISCUSS THE GUIDING PRINCIPLES DRAFT**

Thursday, February 16, 1995

PATRISHA WRIGHT, DISABILITY RIGHTS EDUCATION & DEFENSE FUND
PAUL MARCHAND, THE ARC
KATHERINE NEAS, NATIONAL EASTER SEALS SOCIETY
PATRICIA SMITH, NATIONAL PARENT NETWORK ON DISABILITIES
DR. SYLVIA WALKER, SOCIO-ECONOMIC POLICY STUDIES, HOWARD UNIV.
KIMBERLEY A. TURNER, SOCIO-ECONOMIC POLICY STUDIES, HOWARD UNIV.
CHRISTINA METZLER, AMERICAN OCCUPATIONAL THERAPY ASSOC.
PETER W. THOMAS, AAPMR, ASIA, ACRM, ASOTAPA, ACA, NARRTC, NOD
RONALD DRACH, DISABLED AMERICAN VETERANS
TONY YOUNG, AMERICAN REHABILITATION ASSOCIATION
DAVID FIELDS, AMERICAN REHABILITATION ASSOCIATION
BRENDA BATTAT, SELF-HELP FOR HARD OF HEARING PEOPLE
MAUREEN MCCLOSKEY, PARALYZED VETERANS OF AMERICA
SUSAN HARRIS, NATIONAL MULTIPLE SCLEROSIS SOCIETY

Tuesday, February 21, 1995

JANET O'KEEFFE, AMERICAN PSYCHOLOGICAL ASSOCIATION
JOSEPH ROGERS, NATIONAL MENTAL HEALTH CONSUMER SELF-HELP CLEARING
HOUSE
BOB BOHLMAN, NAMI
STEPHANIE THOMAS, ADAPT
JUDI CHAMBERLIN, CENTER FOR PSYCH REHAB
JULIA BELL, NATIONAL ASSOCIATION OF DEVELOPMENTAL DISABILITIES
COUNCILS
ALAN DINSMORE, AMERICAN FOUNDATION FOR BLIND
CHRISTOPHER BUTTON, UNITED CEREBRAL PALSY ASSOCIATIONS
JIM GASHEL, NATIONAL FEDERATION OF THE BLIND
ORAL MILLER, AMERICAN COUNCIL OF THE BLIND
WILLIAM WANAMAKER, PROJECT ACCESSABILITY
JUSTIN DART, JUSTICE FOR ALL
STEVEN M. EIDELMAN, KENNEDY FOUNDATION
JOSEPH MANES, BAZELON CENTER FOR MENTAL HEALTH LAW
DR. FRED FAY, DISABILITY RIGHTS VOTER EDUCATION (SPEAKER PHONE)

~~At 5:00~~

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Lewis

Tues pulled
supper at home

garden

- Self-determined needs
- specify "services": transp, housing

Protection & Advocacy
PART program
DRAFT

**National Disability Policy Review
Guiding Principles
D R A F T**

- Federal role & advocates oriented monitoring

The fundamental role of governments in respect to individuals with disabilities should be to assure the right of such persons to enjoy full inclusion and integration in the educational, economic, political, social, and cultural mainstream of American society. In practical terms, therefore, governments must assure that people with disabilities of all ages, ethnic backgrounds, and income levels have the equal opportunity to exercise their full rights and responsibilities to live as independently as possible; to enjoy self-determination; to make choices; and, to be productive throughout their lives. It is, therefore, in the nation's interest that public policies, programs, benefits, and activities affecting such individuals be designed and implemented to:

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- o Expand the ability and flexibility of states and local governments to work directly with people with disabilities and their families to fashion more effective and responsive solutions to the challenges we face as a nation. *Federal Role*
- o Improve access to the assistance, technology, and supports that enable these individuals to have greater control over their lives and contribute more fully to their home, family, school, work, and community life.
- o Assure that all current and future programs and activities are designed and implemented to meet the needs of those eligible members of the public who have disabilities.
- o Make it pay for such citizens to work by creating incentives rather than disincentives to work and to pursue careers.

Integrative
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Roll out
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National Disability Policy Review
Guiding Principles

DRAFT

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National Disability Policy Review
Guiding Principles
D R A F T

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Cox

Fred Fay
Bob Seiguy
Marion Bristol
Judy Chamberlain
Annie Bevenson
Mae S.
Rogers
Roberts
Walker

Jan
1st

~~Handwritten scribbles~~

22, 23 → child care
child welfare + nutrition

THE WHITE HOUSE

WASHINGTON

FAX TO MEMBERS OF THE NATIONAL DISABILITY POLICY REVIEW

Attached please find the agenda for the upcoming meeting of the National Disability Policy Review Team. As you know, the meeting will be held this Wednesday, February 22 in Room 248 of the Old Executive Office Building from 2:00 to 3:30 pm. If you would like to attend and have not contacted us, please call Elisabeth Cohen at 202-456-5571 to provide clearance information (date of birth).

Thank you.

Distribution:

Roberta Achtenberg
Gary Blumenthal
Carolyn Colvin & Susan Daniels
Speed Davis
Dennis Duffy
Eddie Espinosa
Judy Feder & Bob Williams
Patsy Fleming
W. Scott Gould
Michael A. Grant
Judith Heumann
Frank Kruesi
Joe Meade
Paul S. Miller
Josephine Nieves
Fred Pang
Larry Parks
Deval Patrick

TOTAL NUMBER OF PAGES INCLUDING COVER: 2

CC: Ken Apfel, Lisa Fairhall, Debbie Fine, Diana Fortuna,
Richard Green, Lynn Margherio, Lorraine Miller, Jen O'Conner,
Joe Stiglitz, Tracey Thornton

THE WHITE HOUSE

WASHINGTON

NATIONAL DISABILITY POLICY REVIEW

Meeting of the Review Team

February 22, 1995

Room 248, Old Executive Office Building

AGENDA

Welcome and Introduction Carol H. Rasco and Alice Rivlin

Review of Guiding Principles Bob Williams, Diana Fortuna and
Draft and Advocacy Groups' Lynn Margherio
Comments

Update on Work Group Efforts:

o	Adult Employment	Susan Daniels
o	School-to-Work	Judy Heumann
o	Accommodations	Liz Savage
o	Childhood	Judy Feder

Status of Program Inventory Lisa Fairhall and Richard Green

THE WHITE HOUSE

WASHINGTON

FAX TO MEMBERS OF THE NATIONAL DISABILITY POLICY REVIEW

Distribution:

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Judith Heumann
James R. Lyons
Frank Kruesi
Paul S. Miller
Josephine Nieves
Fred Pang
Larry Parks
Deval Patrick

TOTAL NUMBER OF PAGES INCLUDING COVER: 3

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Richard Green, Lynn Margherio, Lorraine Miller, Jen O'Conner,
Joe Stiglitz, Tracey Thornton

THE WHITE HOUSE

WASHINGTON

February 14, 1995

MEMORANDUM TO MEMBERS OF THE NATIONAL DISABILITY POLICY REVIEW
TEAM

FROM: Carol H. Rasco *CHR*
Assistant to the President for Domestic Policy

Alice Rivlin *AR*
Director, Office of Management and Budget

SUBJECT: Meeting Reminder, Guiding Principles and Request for
Agency Program Information

The next meeting of the full Review team will be held next Wednesday, February 22 from 2:00-3:30 p.m. in Room 248, Old Executive Office Building. At this time, we will discuss any final comments on the attached draft of the Guiding Principles and review the next steps for each work group.

The work group convenors are currently in the process of meeting with representatives of the advocacy community to discuss the Guiding Principles draft and to provide them with an update on Review progress to date. The comments we gather at these sessions will also be an important part of our discussion during next week's meeting.

As you know, we have requested that each agency provide program information on federal programs for people with disabilities in advance of the February 22 meeting. At that time, a package of material submitted will be distributed to the members of the Review. If you have not submitted this information and/or have questions, please contact Lisa Fairhall (phone:395-7766) or Richard Green (phone:395-7398). As we discussed at our last meeting, this inventory will provide a critical baseline of information for the ongoing work of the Review and should be completed as soon as possible.

Please contact Elisabeth Cohen (phone:456-5571) to provide clearance information for the meeting next Wednesday.

Thank you.

Group 1

AIDS Action Council
American Council of the Blind
American Foundation for the Blind
American Psychiatric Association (addition)
~~American Psychological Association~~
~~American Rehabilitation Association~~
Bazelon Center for Mental Health Law
Center for (Sylvia Walker) (addition)
Justice for All (Justin Dart) (name change)
Kennedy Foundation
National Association of Developmental Disabilities Councils
NAPAS
National Council on Independent Living
National Federation of the Blind
Project Accessibility
UCPA
National Mental Health Consumer Self Help Clearing House

10/16

302

Group 2

The Arc
DREDF (Pat Wright - DC office)
DAV
PVA
Gallaudet University
National Association of the Deaf
National Alliance for the Mentally Ill
Self-Help for Hard of Hearing People
AOTA
National Mental Health Association
Peter Thomas
National Parent Network on Disabilities
Easter Seals (name change from AAUAP)
Center for Psychiatric Rehabilitation
Multi Multiple Sclerosis

Groups that should be consulted but won't come

ADAPT
Disability Rights and Voter Education (Fred Faye)
WID

sign language interpreter?
braille?

Call Elizabeth



Post-It™ brand fax transmittal memo 7671		# of pages	3
To	Dbbie Fine		From
Co.			Co.
Dept.			Phone #
Fax #	62983		Fax #

Meeting of the Work Group Convenors
National Disability Policy Review
February 8, 1995
Room 211, Old Executive Office Building

Agenda

Welcome and Introduction

Carol H. Rasco

Next Steps:

- o Adult Employment
 - o School-to-Work
 - o Accommodations
 - o Childhood
- Handwritten notes: Susan (next to Adult Employment), Judy (next to Childhood), and a bracket connecting School-to-Work and Accommodations with the number 2.*

Each Convenor will
be asked to make
brief remarks

Guiding Principles

Bob Williams to lead
discussion of substance,
process and time-line

Inventory of Agency Program
Information

Lisa Fairhall, Richard
Green & Lynn Margherio

Advocacy Groups

Diana Fortuna & Lynn
Margherio

FEB-07-1995 17:20 FROM ADD

TO

94567028 P.02

To: fax[Judy Heumann-OSERS, 9-205-9252]
internet[howard_moses@ed.gov]
fax[Liz Savage, 9-514-0293]
fax[Paul Miller-EEOC, 9-663-7101]
fax[Susan Daniels, 9-1-410-965-6503]
fax[Speed Davis-Nat.Coun.Disab., 9-272-2022]
Kate Warren@ADD.ODDP@ACF.WDC
Judith Feder@ASPE.ENS@OS.DC

Cc:

Bcc:

From: Bob Williams@ADD.OC@ACF.WDC

Subject: DPC Disability Policy Principles

Date: Tuesday, February 7, 1995 16:59:29 EST

Attach:

Certify: N

Forwarded by:

Note: Changes and additions made below are based on a conversation with Dianna Fortuna and other DPC staff and are in bold.

The fundamental role of governments in respect to individuals with disabilities should be to assure the right of such persons (citizens?) to enjoy full inclusion and integration in the educational, economic, political, social and cultural mainstream of American society. In practical terms, therefore, governments must assure that people with disabilities have an equal opportunity to exercise their full rights and responsibilities to live as independently as possible; enjoy self-determination; make choices; and, to be productive throughout their lives. It is, therefore, in the Nation's interest that public policies, programs, benefits and activities affecting such individuals be designed and implemented to:

- o Provide strong, effective and fair enforcement of the Americans with Disabilities Act, Title V of the Rehabilitation Act, the Fair Housing Act Amendments, and the Individuals with Disabilities Education Act to help end discrimination against Americans with disabilities and strengthen our Nation's communities and economy.
- o Strengthen the capacities of such persons and assure that needed services and supports are provided in a coordinated fashion which maximizes their control over their own lives and futures in the mainstream of American life.
- o Assure that any assistance provided to such a person is carried out in an individualized manner, consistent with the unique strengths, resources, priorities, concerns, choices, abilities and capabilities of that individual.
- o Support the efforts of families with children with disabilities to raise their sons and daughters at home and to include them in every facet of family and community life.
- o Expand the ability and flexibility of States and local governments to work directly with people with disabilities and their families to fashion more effective and responsive solutions to the challenges we face as a Nation.

o Improve access to the assistance, technology and supports which enable these individuals to have greater control over their lives and contribute more fully to their home, family, school, work and community life.

o Design all programs and activities to be meet the needs of the public and disability related needs of individuals with disabilities.

o Make it pays for such citizens to work by creating incentives rather than disincentives to work and to pursue careers.

DRAFT**MEMORANDUM FOR CAROL RASCO AND ALICE RIVLIN**

FROM Lisa Fairhall and Richard Green
 Jeremy Ben-Ami and Stan Herr

SUBJECT Draft Proposal for DPC/OMB Disability Task Force

Background

You have agreed to establish a joint DPC/OMB task force to examine issues surrounding Federal and national responsibilities for providing assistance to and protecting the rights of individuals with disabilities.

Below, we propose: a task force agenda, task force and support team composition, a time frame for task force activities, and some first organizational steps. The questions we have proposed to form the agenda for this Task Force are provisional; our initial conversations with key individuals will seek to validate their inclusion in the agenda, to determine what other issues must be addressed, and to set priorities for the Task Force.

I. PROPOSED TASK FORCE AGENDA

The Task Force should be guided by the President's credo of supporting public and private initiatives to enhance the independence and productivity of persons with disabilities. The Task Force should answer, to the extent possible, the following questions, in order to articulate and refine the Administration's overall disability policy:

National Disability Policy:

- Can we articulate a national disability policy to animate or guide Federal law and regulations?
- What is the Federal role in a national disability policy? What is the rationale for each specific Federal responsibility (e.g., constitutional right, insurance, indemnity, need)? Do the scope and nature of the responsibilities differ based on age (children vs. adults) or severity of disability?
- What are the policies and realities in other countries (e.g., Sweden, Canada, Germany) that may offer insight and direction to our policies and programs?

Federal Disability Programs:

- How are we meeting current responsibilities? What is the current array of programs? What services/benefits are they providing? What values do they promote? How delivered? To whom? What are the gaps and overlaps? How are the Federal programs/services integrated with State and local government programs? Are there exemplary State and local government programs? How can good practices be disseminated/encouraged?
- What do we know about the effect of each program and policy on recipients? What data are we currently collecting in each area? What do we need to answer the impact questions better?

Identifying and Implementing Change:

- What changes are needed to program purposes and program structure to better meet current Federal responsibilities? Are we currently identifying and reaching those individuals in need of services? Are we providing the most effective array of services and benefits for the costs incurred by each level of government, the individual, and the private sector?
- For those responsibilities identified but not addressed, what should be done, and by whom?
- Should we revise statutes and regulations to align definitions of disability across programs? What specific impact would such revisions have on eligibility and services? How can we make sense of eligibility criteria for various programs, to minimize overlap and duplication of services and benefits, and ease administration and assessment of program performance and move each program's focus towards participant outcomes (e.g., enhanced independence, community integration, self-sufficiency, greater productivity)?
- Should we develop a legislative strategy to integrate cash benefit programs with service programs to promote beneficiary independence and self sufficiency and reduce the need for benefits? To what extent can we test new approaches through pilot or demonstration programs before moving to national implementation?

Federal Government as a Model:

- How well does the Federal Government serve as a model, in both employment policies and practices, and customer service? How can this be improved for the benefit of job applicants, employees, customers, and members of the general public with disabilities?

Program/Issue Areas:

Program areas to be reviewed would include (but need not be limited to):

- o services to infants and toddlers
- o education programs
- o cash benefit programs (insurance, income assistance, and retirement)
- o medical and other health programs
- o social services and family supports
- o school-to-work transitional services
- o rehabilitation services and training
- o employment services
- o transportation services
- o housing
- o advocacy services, information and referral
- o personal assistance
- o civil rights enforcement
- o services for older persons
- o technology-related assistance
- o prevention programs

The work product should take the form of a report outlining the Task Force's answers to these questions, and recommendations for further action, including actions the Administration can take through changes to regulation or funding priorities, grants and contracts, administration of the Federal Government's own internal activities (e.g., employment and customer service practices), or legislative proposals.

II. TASK FORCE COMPOSITION

We recommend the following structure for the task force:

- The Task Force would be jointly directed by the White House and OMB, but would rely heavily on agency participation.
- The Task Force would be headed by the two of you, as "co-chairs."
- Each of the key agencies with an interest in disability issues (which would include at least ED, HHS, SSA, DoD, VA, OPM, DOL, HUD, and the Treasury) would be invited to participate at the policy level through designees of the agency heads, presumably Assistant Secretaries responsible for key program and policy areas. Where appropriate, more than one Assistant Secretary could be designated for an agency.

We recommend the following structure for the support team:

- Designate "co-team leaders" from OPD/DPC and OMB staff -- these are the people who would be responsible for making the task force happen. The Co-team leaders would be responsible for organizing Task Force meetings and for directing the work of the support team.

- Designate as additional support team members OPD/DPC and OMB staff who are currently involved in the disability area. For OMB, PADs would designate the examiners responsible for accounts funding key disability programs to be members of the support team. The Administrator of OIRA should also designate one or more staff to join the team.
- The agencies would be asked to designate staff to participate as members of the support team. We would expect each policy official to designate two or three people from their areas to be members of the team.
- Even though this could result in a fairly large number of staff, we envision the support team dividing into small subgroups, each tasked with researching specific areas along the lines of the proposed agenda.

We recommend that the Task Force utilize the following for advice:

- Draw on the expertise of the three Presidential advisory councils -- the President's Committee on Employment of People with Disabilities, the National Council on Disability, and the President's Committee on Mental Retardation -- in the design of the agenda and how it will be carried out. These councils could also provide the forum (formally or informally) to tap disability community sentiments.
- Invite the Architectural and Transportation Barriers Compliance Board, the Equal Employment Opportunity Commission, and the Federal Communications Commission to participate as appropriate.
- Individuals with disabilities, members of their families, and their advocates should be consulted regularly (formally and informally).

III. TIME FRAME FOR ACTION

We recommend that the Task Force be constituted, the support team named, and the agenda (see above) agreed on by the end of October. The Task Force could be initiated at a meeting of the DPC, co-chaired by the two of you, with other appropriate department or agency heads invited. We recommend that the timeframe for this Review be lengthy enough to ensure a comprehensive and thoughtful deliberative process, and to analyze and synthesize the findings of the Task Force and support group and develop recommendations. The specific dates for interim and final reports should be determined by the Task Force. The Task Force itself would meet at least once every three months.

III. NEXT STEPS

This National Disability Policy Review is a significant undertaking, of tremendous importance to the disability community, and no doubt will be subject to a great deal of comment and scrutiny both in and out of the Administration. To get the review off on the right foot, we propose devoting time in September and early October to laying the groundwork internally and externally through a series of meetings outlined below, before the Task Force Team begins its work. This outreach and initial leg-work will improve our design and create good will by informing and involving people on the front end and ensuring avenues for communication and input throughout the process. We will take care to make very clear that the suggestions received from this outreach process will be considered in the development of the agenda, but that we do not expect every recommendation to be included.

Pending your review and approval, we would propose the following steps and schedule:

Mid-late September: We (working as a kind of DPC/OMB staff "advance team") would hold preliminary meetings with administration officials at key agencies to explore the idea of a Review, brainstorm about its structure, work plan, and agenda. With help from Mike Lux in the Office of Public Liaison and from the Office of Legislative Affairs, we would identify and meet with key advocates and Hill staff to give them advance notice and discuss avenues for their input and consultation throughout the Review.

We would also meet with the three existing Federal advisory groups whose mandate is to provide advice to the President in this area: the President's Committee on Employment of People with Disabilities, the National Council on Disability, and the President's Committee on Mental Retardation.

We believe it is vital to the success of the Review to ensure that there is strong ongoing communication concerning the Review with members of Congress and their staff, advocates, and persons with disabilities. The three national commissions mentioned provide a logical starting point for such communication. Based on meetings with those commissions and their staffs, the Task Force will include in its October recommendations a plan for outreach and communication regarding the Review.

Early October: The two of you present the idea for a National Disability Policy Review to a special meeting of the Domestic Policy Council, also attended by other appropriate department and agency heads (e.g., Treasury, Defense), perhaps prefaced by an abridged presentation of material and questions from the OMB Disability Review prepared this summer. You ask Secretaries to designate members of the Task Force at the Assistant or Deputy Assistant Secretary level, as well as staff level support team who will be able to devote some time to this effort. The Task Force will also be charged with providing periodic updates and interim reports to both the DPC and OMB.

Late October: Convene the first meeting of the Task Force, chaired by the two of you, where you provide the charge to the group, and present it with a proposed agenda and workplan, built on the groundwork laid at the individual agency meetings in September. You

will ask the members to react to the proposed work plan and agenda by the middle of the month.

Early November: Convene the staff level support team, to discuss and synthesize Task Force members' comments on the proposed agenda and work plan, and to prepare for Task Force meeting in late October.

At this point, the two of you may wish to review the proposed agenda, and adjust the list of issues presented so as not to risk committing the Review to more than you think it can achieve. This would help to keep expectations of what the Review will accomplish within manageable bounds.

Late November: The Task Force meets to discuss and finalize agenda, workplan, and staff structure of the Review.

THE WHITE HOUSE
WASHINGTON

Meeting of National Disability Policy Review Team

November 30, 1994, 2:00 - 3:30

Room 248 OEOB

Agenda

Welcome and Introductions	Carol H. Rasco The White House
Framework for the Review	Carol H. Rasco
Alternative Policy Tracks	Full Group
Formation of Issue Groups	Full Group
Consultation Tracks	Full Group
Next Steps and Closing	Carol H. Rasco

**National Disability Policy Review
Work Group Assignments**

November 30, 1994

WORK GROUP TITLE:

SEN - IN

MEMBERS:

	NAME/ AGENCY	PHONE
1.	<u>JEREMY BEN-AM</u>	<u>456-5584</u>
2.	<u>Wendy Taylor /OMB</u>	<u>395-7316</u>
3.	<u>Laurel Illston /OMB</u>	<u>395-7809</u>
4.	<u>Nancy Ebersole /DOT</u>	<u>366-4864</u>
5.	<u>IRA HASTER JR /DOT</u>	<u>366-4855</u>
6.	<u>FRANK KRESI DOT</u>	<u>366-4544</u>
7.	<u>DAVID ELLWOOD HHS</u>	<u>690-7858</u>
8.	<u>Jeffrey Levi ONAP</u>	<u>632-1090</u>
9.	<u>Roberta Achtenberg HUD</u>	<u>708-4252</u>
10.	<u>Cardyn W. Colvin SSA</u>	<u>965-4512</u>
11.	<u>RON GLASER TREASURY</u>	<u>622-1160</u>
12.	<u>BERNARD Andersen LABOR</u>	<u>219-6191</u>
13.	<u>DENN. SUFFY VA</u>	<u>212-8125</u>
14.	<u>Deval Patrick DOJ</u>	<u>514-2151</u>
15.	<u>Isabel Sawhill OMB</u>	<u>395-4844</u>
16.	<u>Stan Hen RPC</u>	<u>456-5570.</u>
17.	<u>RICK GRAND USDA</u>	<u>720-7173</u>
18.	<u>Connie Gardner</u>	<u>Dep't. of ED. 205-8124</u>
19.	<u>Judy Heumann</u>	<u>Dep't of Ed 2055465</u>
20.	<u>Lusan Daniel</u>	<u>SSA 410-965-3424</u>
21.	<u>Michael GRANT</u>	<u>OPM (202) 606-2086</u>
22.	<u>W. S. V. L.</u>	<u>DOJ 514 4274</u>

23. Paul Steven Miller / EEOC 663-4036
24. Debbie Fine / WH OPL 456-2972
25. RICHARD GREEN / OMB 395-7398
26. LISA FAIRHALL / OMB 395-7766
27. Carolyn Gurney / Commerce 482-2779
28. Robson Stone / DHS 690-6443
29. Ken McGill / SSA 410-965-3988
30. Claiborne HAUGHTON
FOR FRED PANG, DEPARTMENT OF
DEFENSE (703) 695-D105
31. Bob Williams / IHS 6906904

MEMORANDUM FROM JEREMY BEN-AMI AND STANLEY S. HERR

TO: DESIGNEES TO THE NATIONAL DISABILITY POLICY REVIEW

DATE: November 22, 1994

PRELIMINARY WORK PLAN
Discussion Draft Only
National Disability Policy Review
December 1994 - February 1995

Background

In response to initial memoranda suggesting a National Disability Policy Review, the Domestic Policy Council received comments and input on the Review's proposed agenda and work plan. We have met or will soon be meeting with all the Departmental designees. We have consulted key advocates in the disability community, Congressional staffers, the heads of three presidential advisory committees in the disability field, and other experts. In addition, we have made a presentation on the Review to the full membership of the President's Committee on Mental Retardation, reached out to the Administration's appointees with disabilities, and begun to obtain background policy papers.

Oral and written responses have emphasized that such a review is important, overdue, and should involve significant input from individuals with disabilities and their advocates. The comments also stressed the need to be realistic in setting goals and to focus on some shorter-term achievable goals while simultaneously engaging in a long-term policy process.

Based on these comments, we have outlined in the following pages key options and questions to be discussed by the Review Team on November 30th as it develops a proposed work plan for the first three months of the Review. We received a great deal of feedback that we should conduct our work in phases, focusing initially on some things and later on others. Although this discussion draft suggests possible ways of phasing the work, the key decisions of whether and how to stagger the work of the Team are left open for discussion on the 30th. We do hope that at that meeting or soon thereafter issue groups will be formed, members will volunteer for those groups, and concrete assignments with deadlines will be made.

Please review the attached material in advance of the meeting, prepare your concrete suggestions, and be ready to identify those tasks in which you and your staff will be able to participate. Thank you for your constructive engagement in this process so far.

Work Plan

This draft Work Plan proposes proceeding on two parallel tracks for the next three months. On the "Policy" track, the Team will break into a series of issue groups to address areas agreed to on the 30th. On the "Consultation" track, we propose outreach and coordination with the advocacy community, Congressional staff, and the Presidential committees. These two tracks are outlined in more detail below, and a timetable follows.

I. POLICY TRACK

Two possible approaches to the work of the Review have been proposed. At the meeting on the 30th, we would like to focus discussion on the potential frameworks described below, and any additional ones that Review Team members would like to suggest. Within each framework, there is the further question of whether and how to phase the work - i.e., do we start all of the subgroups working at once or do we begin some sooner than others.

A. Framework A: The "Life Cycle" Approach

One approach to the Review is to set up a series of interagency subgroups oriented around the different phases in people's lives - so that the full range of policies, programs and issues affecting people of different age groups can be looked at holistically. There are at a minimum, three clear subgroups that could be set up, but there might be more:

1. Childhood -- This subgroup would look at the range of educational, income benefit, and service programs available for children, from birth to age 18. This group would be particularly timely given the creation of the Childhood Disability Commission to look at the SSI program and the need to develop an administration policy that anticipates or responds to the findings of the Commission. Also, the Individuals with Disabilities Education Act (IDEA) is up for reauthorization this year and will certainly raise important policy issues.
2. Transition to Adulthood -- This subgroup would explore a range of issues related to the transition to adulthood from education programs that serve people until they are 18 (but sometimes 21). "Transitions" planning involves helping people to find employment, further schooling, independent or assisted living arrangements, and other activities that maximize their potential. There is a small group that has already begun meeting on this issue, and it might make sense to fold its work into the Review.
3. Adulthood -- This subgroup would focus on policies affecting

adults. A work group in this area would almost certainly focus on the problems associated with the chronic unemployment and underemployment of persons with disabilities and review policy options for helping people enter -- and remain -- in the workforce.

In addition, it might make sense to break into some narrower groups, for instance, having a group on infants and toddlers, and one on aging and the elderly.

B. Framework B: The Issue Cluster Approach

An alternative framework for the Review is to break into issue-based subgroups that would look at such areas as:

- o work and employment policies
- o housing
- o technology
- o transportation
- o childhood issues
- o administrative coordination of, for instance, applications for services, eligibility, services, and consumer information

A more complete list of potential issue clusters appears on pages 2 and 3 of the September 30th memorandum. The selection of issue clusters for the Review would be made by the Team on November 30th. Each subgroup would still be an interagency effort looking across departmental and program lines but might have a narrower substantive and strategic focus.

The Team might choose to adopt some of Framework A and some of Framework B and form some "Life Cycle" groups and some issue-based groups.

C. Discussion on November 30th

The key issues for discussion and decision on November 30th will be:

- o What general framework does the Team want to adopt to guide its work? Does the life-cycle or the issue-based approach, or some combination, make sense?
- o Given the general framework adopted, what is the best way to break into subgroups?
- o Do we want to form all the subgroups at this point, and if so, should they all begin work now, or should we phase them in over the coming months?

We hope that the end result of the meeting on the 30th will be that the Review Team forms several interagency groups, each chaired by a member of the Review Team, which any Review Team member may join. Decisions about groups can be revisited throughout the Review, as appropriate. A decision not to include an issue in the first phase should not be taken as a reflection of its importance as an issue.

D. Other Subgroups

In addition to the groups addressing policy areas as discussed above, two other suggestions have been made for potential subgroups for the Review:

1. Guiding Principles -- There was significant agreement that the Review would benefit from the early development of a set of principles articulating the values guiding the Review. This statement of principles would not predetermine the policies to be developed through the Review, but instead would guide Review Team members and staff in their work. It might eventually be the preamble to the Review's final report, but it might also be significantly modified along the way.

These guiding principles would draw not only on Administration policy and statements, speeches and comments by the President, but on policies incorporated in recent legislation in this area.

We propose forming a group on the 30th, charged with producing a short document not a lengthy discourse in consultation with all Review Team members and broadly with consumers and advocates. In addition to producing a draft for comment by the Review Team, the group would also propose a mechanism for obtaining broad public comment and a timetable for its public dissemination.

2. Federal Disability Accommodations Working Group -- In August, the DPC formed a Federal Disability Accommodations Working Group, which has just started to examine how the federal government can be a model of making reasonable accommodations that will benefit its customers, job applicants, employees, and the general public.

The work of this group could lead to short-term achievable administrative recommendations that would help demonstrate the Administration's commitment in this area.

II. CONSULTATION TRACK

We would like to proceed on several fronts externally as the policy groups are formed to begin their work.

A. Presidential Committees

We will continue to work closely with the Presidential committees to provide them the opportunity to be integrally involved in the Review. We hope the Committees will be interested in exploring the same policy areas as the Review Team and in meeting with the Review Team members and gathering public input on these policy questions.

B. Advocacy Organizations

The policy groups should each meet with a wide range of organizations representing the interests of people with disabilities to give them the opportunity to provide information and input into their work.

C. Legislative

We will also meet with legislative staff from both Houses and both parties to keep them fully apprised of the work of the Review.

TIMETABLE

A possible timetable would be as follows:

November 30	Issue groups formed
Early January	Initial work products available for review
	12/19 ← <u>Guiding Principles</u> : Draft statement and plan for public comment
	① Children ② School to work ③ Working all employment ← <u>Other Subgroups</u> : Draft scope of work and timetable for each subgroup
Second week January	Second meeting of the Review Team to review progress of issue groups and discuss draft of Guiding Principles. Overall scope of work and timetable for the entire Review to be discussed.
	① principles ⑤ accommodation
Early February	Initial background papers completed. Key policy questions identified.
	Review Team meets to determine what policy options each subgroup should pursue and how.

67028

Groups

AIDS Action Council ✓
American Council of the Blind ✓
American Foundation for the Blind ✓
AOTA ✓
American Psychiatric Association (addition) ✓
American Psychological Association ✓
American Rehabilitation Association ✓
The Arc ✓
Bazelon Center for Mental Health Law
Center for (Sylvia Walker) (addition)
DAV
DREDF (Pat Wright - DC office)
~~Easter Seals (name change from AAHAP)~~
~~Gallaudet University~~ →
Justice for All (Justin Dart) (name change)
Kennedy Foundation
National Association of Developmental Disabilities Councils
National Association of the Deaf
National Alliance for the Mentally Ill
NAPAS
National Council on Independent Living
National Federation of the Blind
~~National Head Injury Foundation~~ → DM
National Mental Health Association
National Parent Network on Disabilities
Project Accessibility
PVA
Peter Thomas
Self-Help for Hard of Hearing People
UCPA

Groups that should be consulted but won't come

ADAPT *Brooklyn* →
Center for Psychiatric Rehabilitation →
Disability Rights and Voter Education (Fred Faye) →
National Mental Health Consumer Self Help Clearing House →
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Provide
Consumer
Info?

Arthur Wilson
Executive Director
Disabled American Veterans
807 Maine Avenue, SW
Washington, D.C. 20024
p-554-3501 f-554-3581

Tony Young or
Pat Morrissey,
Vice President, Government Relations for Comm. Programs
American Rehabilitation Association (Amer. Rehab.)
1350 Eye Street, NW, #670
Washington, D.C. 20005
p-789-5700

Dr. George Zitnay
President
National Head Injury Foundation
1776 Massachusetts Avenue, NW
Suite 100
Washington, D.C. 20036
p-202/296-6443 f-202/296-8850

1/4/95

American Psychiatric Assn
Jay Cutler

** Sylvia Walker*
Howard Co.

Susan Ames-Zierman
 Executive Director
 National Association of Developmental Disabilities Councils
 1234 Massachusetts Avenue, NW
 Suite 103
 Washington, D.C. 20005
 p-347-1234 f-347-4023

Mike Auburger
 Co-Director
 ADAPT
 201 S. Cherokee
 Denver, Colorado 80223
 p-303/733-9324 TDD-303/733-0047
 f-303/733-6211

*won't
 come*

Can't for comment

Nancy Bloch
 Executive Director
 National Association of the Deaf
 814 Thayer Avenue
 Silver Spring, Maryland 20910
 p-301/587-1788 TDD-301/588-9551
 f-301/587-1791

NAPAS?

Bob Bchlman
 National Alliance for the Mentally Ill (NAMI)
 2101 Wilson Boulevard
 Suite 302
 Arlington, Virginia 22201
 p-703/524-7600
 f-703/524-9094

Bob Seneguy

Dan Bross, Executive Director OR
 Aimee Berenson, Legislative Counsel
 AIDS Action Council
 Suite 700
 1875 Connecticut Avenue, NW
 Washington, D.C. 20009
 p-986-1300 x.11 f-986-

L. J. Seneguy
Judy F.

Judi Chamberlin
 Center for Psych Rehab
 Boston University
 730 Commonwealth Avenue
 Boston, Massachusetts 02215
 p-617/353-3549 f-617/353-7700

*won't
 come*

DE
Eli's Cohen
456 5571
R

Justin Dart
~~Real Health Care for All~~
 907 6th Street, SW
 Apt. 516C
 Washington, D.C. 20024
 p-202/488-7684 TDD-202/484-1370

Justice for All

Curt Decker
National Association of Protection & Advocacy Systems (NAPAS)
900 2nd Street, NE, #211
Washington, D.C. 20002
p-408-9514

Steve Edelman
Kennedy Foundation
1325 G Street, N.W.
Washington, D.C. 20005-4709
p-824-0214 f-824-0200

Frederick Fay
President
Disability Rights and Voter Education
2054 Main Street
Concord, Massachusetts 01742
p-508/371-0992 f-508/369-5544

*was the
able to come*

Jim Gashel
Government Affairs Director
National Federation of the Blind
1800 Johnson Street
Baltimore, Maryland 21230
p-410/659-9314 f-410/685-5653

1-2000

Al Guida, Executive Director OR
Elizabeth Burrows
National Mental Health Association
1021 Prince Street
Alexandria, Virginia 22314-2971

Anne-Marie Hughey
Executive Director
National Council on Independent Living
2111 Wilson Boulevard
Suite 405
Arlington, Virginia 22201
p-703/525-3406 f-703/525-3409

Dr. I. King Jordan
President
President's Office
Gallaudet University
800 Florida Avenue, NE
Washington, DC 20002-3695
p-651-5005 f-651-5508

*not in
file*

Joe Manes
Bazelon Center for Mental Health Law
1101 15th Street, NW
Suite 2212
Washington, D.C. 20005
p-467-5730 TDD-898-1670 f-223-0409

Gordan Mansfield
Executive Director/ Director of Advocacy
Paralyzed Veterans of America
801 18th Street, NW
Washington, D.C. 20006
p-872-1300 f-785-4452

Paul Marchand
Director, Government Relations
The Arc
1522 K Street, NW
Suite 516
Washington, D.C. 20005
p-785-3388 f-467-4179

Scott Marshall
Director, Governmental Relations OR
Denise Rozell, Government Relations Representative
American Foundation for the Blind
1615 M Street, NW
Washington, D.C. 20036
p-457-1487 f-457-1492

Arlene Mayerson
Legal Director
DREDF (Disability Rights Education and Defense)
2212 5th Street
Berkeley, California 94710
p-510/644-2225 f-510/841-8645

Patty McGill Smith
Executive Director
National Parent Network on Disabilities
1600 Prince Street
Suite 115
Alexandria, Virginia 22314
p-703/684-6763 f-703/836-1232

Chris Metzler
Senior Legislative Representative
American Occupational Therapy Association (AOTA)
1383 Piccard Drive
Rockville, Maryland 20849
p-301/948-9626

Oral Miller
Executive Director
American Council of the Blind
1155 15th Street, NW
Suite 720
Washington, D.C. 20005
p-467-5081 f-467-5085

all done
Red Wright
10/2/95

all done

Michael Morris
United Cerebral Palsy Associations
1522 K Street, NW
Suite 1112
Washington, D.C. 20005
p-842-1266 f-842-3519

Gather Seal
Katy Neas
American Association of University Affiliated Programs (AAUAP)
8630 Fenton Street, #410
Silver Spring, Maryland 20910
p-301/588-8252

Becky Ogle
Project: AccessAbility
625 Sisters Lane, Suite 200
Alexandria, Virginia 22314-1171
p-703/836-6263 f-703/836-6730

Janet O'Keeffe
Public Policy Office
American Psychological Association (APA)
750 First Street, NE
Washington, D.C. 20002
p-336-5934

Ed Roberts
President
World Institute on Disability
510 16th Street
Oakland, California 94612
p-510/763-4100 (V/TDD) f-510/763-4109

Joseph Rogers
Director
National Mental Health Consumer Self Help Clearing House
311 South Juniper Street
Room 902
Philadelphia, PA 19107
p-215/735-2465, 6082 x.312 f-215/735-0275

Donna Sorkin
Executive Director
Self-Help for Hard of Hearing People
7800 Wisconsin Avenue
Bethesda, Maryland 20814
p-301/657-2248 f-301/913-9413

Peter Thomas, Esquire
AAPMR, ASIA, ACRM, ASOTAPA, ACA, NARRTC, NOD
1275 Pennsylvania Avenue, NW
3rd Floor
Washington, D.C. 20004
p-465-6550

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would come

THE WHITE HOUSE

WASHINGTON

December 16, 1994

To all participants in the 11/2/94 meeting:

Thank you for attending the meeting held last month to discuss the **National Disability Policy Review**. We have now launched that Review, and we plan to schedule a second meeting with you in the near future.

Following our November meeting and the first meeting of the Review Team, the Team reached an agreement to initially divide into the following five working groups: Accommodations, Children's Issues, Employment of Working-Age Adults, Guiding Principles, and School-to-Work Transition. While we are beginning the work in these five broad areas, we are interested to know your thoughts and are open to further suggestions.

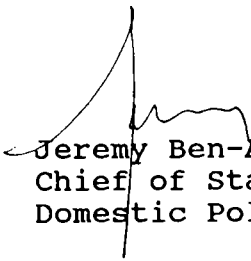
As we discussed, we want to expand our outreach in an effort to involve a larger number of groups in the Review process. We have enclosed what we hope is a more thorough and inclusive list of key organizations to contact regarding future meetings and briefings. It includes the original ten groups that participated in November's meeting and has been expanded with the assistance of some of the participants in that meeting. Please contact Elisabeth Cohen (202-456-2846) if you have any additions or comments.

At our next meeting, representatives of the five work groups listed above will give presentations to familiarize you with our initial proceedings and discuss progress to date. Thanks again for attending the first meeting, and we look forward to working with you.

Sincerely,



Stanley S. Herr
Kennedy Public Policy Fellow
Domestic Policy Council



Jeremy Ben-Ami
Chief of Staff
Domestic Policy Council

Susan Ames-Zierman
Executive Director
National Association of Developmental Disabilities Councils
1234 Massachusetts Avenue, NW
Suite 103
Washington, D.C. 20005
p-347-1234 f-347-4023

Mike Auburger
Co-Director
ADAPT
201 S. Cherokee
Denver, Colorado 80223
p-303/733-9324 TDD-303/733-0047
f-303/733-6211

Nancy Bloch
Executive Director
National Association of the Deaf
814 Thayer Avenue
Silver Spring, Maryland 20910
p-301/587-1788 TDD-301/588-9551
f-301/587-1791

Dan Bross, Executive Director OR
Aimee Berenson, Legislative Counsel
AIDS Action Council
Suite 700
1875 Connecticut Avenue, NW
Washington, D.C. 20009
p-986-1300 x.11 f-986-

Judi Chamberlin
Center for Psych Rehab
Boston University
730 Commonwealth Avenue
Boston, Massachusetts 02215
p-617/353-3549 f-617/353-7700

Justin Dart
Real Health Care for All
907 6th Street, SW
Apt. 516C
Washington, D.C. 20024
p-202/488-7684 TDD-202/484-1370

Curt Decker
National Association of Protection & Advocacy Systems (NAPAS)
900 2nd Street, NE, #211
Washington, D.C. 20002
p-408-9514

Steve Eidelman
Kennedy Foundation
1325 G Street, N.W.
Washington, D.C. 20005-4709
p-824-0214 f-824-0200

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President
Disability Rights and Voter Education
2054 Main Street
Concord, Massachusetts 01742
p-508/371-0992 f-508/369-5544

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Government Affairs Director
National Federation of the Blind
1800 Johnson Street
Baltimore, Maryland 21230
p-410/659-9314 f-410/685-5653

Al Guida, Executive Director OR
Elizabeth Burrows
National Mental Health Association
1021 Prince Street
Alexandria, Virginia 22314-2971

Anne-Marie Hughey
Executive Director
National Council on Independent Living Center
2111 Wilson Boulevard
Suite 405
Arlington, Virginia 22201
p-703/525-3406 f-703/525-3409

Dr. I. King Jordan
President
President's Office
Gallaudet University
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Washington, DC 20002-3695
p-651-5005 f-651-5508

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Bazelon Center for Mental Health Law
1101 15th Street, NW
Suite 1212
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p-467-5730 TDD-898-1670
f-223-0409

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Executive Director/ Director of Advocacy
Paralyzed Veterans of America
801 18th Street, NW
Washington, D.C. 20006
p-872-1300 f-785-4452

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Director, Government Relations
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Washington, D.C. 20005
p-785-3388 f-467-4179

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1615 M Street, NW
Washington, D.C. 20036
p-457-1487 f-457-1492

Arlene Mayerson
Legal Director
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p-703/684-6763 f-703/836-1232

Chris Metzler
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1383 Piccard Drive
Rockville, Maryland 20849
p-301/948-9626

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Executive Director
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Suite 720
Washington, D.C. 20005
p-467-5081 f-467-5085

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p-842-1266 f-842-3519

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8630 Fenton Street, #410
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p-301/588-8252

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Project: AccessAbility
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Suite 200
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p-703/836-6263 f-703/836-6730

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Public Policy Office
American Psychological Association (APA)
750 First Street, NE
Washington, D.C. 20002
p-336-5934

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President
World Institute on Disability
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Oakland, California 94612
p-510/763-4100 (V/TDD) f-510/763-4109

Joseph Rogers
Director
National Mental Health Consumer Self Help Clearing House
311 South Juniper Street
Room 902
Philadelphia, PA 19107
p-215/735-2465, 6082 x.312 f-215/735-0275

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Executive Director
Self-Help for Hard of Hearing People
7800 Wisconsin Avenue
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p-301/657-2248 f-301/913-9413

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AAPMR, ASIA, ACRM, ASOTAPA, ACA, NARRTC, NOD
1275 Pennsylvania Avenue, NW
3rd Floor
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Executive Director
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p-554-3501 f-554-3581

Tony Young or
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Washington, D.C. 20005
p-789-5700

Dr. George Zitnay
President
National Head Injury Foundation
1776 Massachusetts Avenue, NW
Suite 100
Washington, D.C. 20036
p-202/296-6443 f-202/296-8850

12/16/94

The following represents the collective thoughts and creative energies of Judy Heumann, Howard Moses, Susan Daniels, Liz Savage, Paul Miller, Andy Imp..., Speed Davis, Kate Warren and myself. It is meant to be a point of departure rather than a final product. Thank you! Bob Williams

The fundamental role of governments in respect to individuals with disabilities should be to assure the right of ~~such persons~~ ~~(citizens?)~~ to enjoy full inclusion and integration in the educational, economic, political, social and cultural mainstream of American society. In practical terms, therefore, governments must assure that people with disabilities have an equal opportunity to live as independently as possible; enjoy self-determination; make choices; and, to be be productive throughout their lives. It is, therefore, in the Nation's interest that public policies, programs, benefits and activities affecting such individuals be designed and implemented to:

reverse current regulations

- o Provide strong, effective and fair enforcement of the Americans with Disabilities Act, Title V of the Rehabilitation Act, the Fair Housing Act Amendments, and the Individuals with Disabilities Education Act to help end discrimination against Americans with disabilities and strengthen our Nation's communities and economy.

regulators

- o Strengthen the **capacities** of such persons and assure that needed services and supports are provided in a coordinated fashion which maximizes their control over their own lives and futures in the mainstream of American life.

- o Assure that any assistance provided to such a person is carried out in an individualized manner, consistent with the unique strengths, resources, priorities, concerns, *and parents?* choices, abilities and capabilities of that individual.

enable families w/ members w/ disabilities

- o Support the efforts of families with children with disabilities to raise their sons and daughters at home and to include them in every facet of family and community life.

Add bullet to age

- o Improve access to the assistance, technology and supports which enable these individuals to have greater control over their lives and contribute more fully to their home, family, school, work and community life.

- o Assure that qualified individuals with disabilities have the opportunity to achieve equally effective results in all programs and activities by insuring such support is universally designed to meet the needs of the public and disability related needs as well.

- o Make it pays for such citizens to work by creating incentives rather than disincentives to work and to pursue careers.

THE WHITE HOUSE

WASHINGTON

FAX TO MEMBERS OF THE NATIONAL DISABILITY POLICY REVIEW

Distribution:

Robert A. Achtenberg
Bernard E. Anderson
Gary Blumenthal
Carolyn Colvin & Susan Daniels
Speed Davis
Dennis Duffy
David T. Ellwood & Bob Williams
Patsy Fleming
W. Scott Gould
Michael A. Grant
Judith Heumann
James R. Lyons
Frank Kruesi
Paul S. Miller
Fred Pang
Larry Parks
Deval Patrick

TOTAL NUMBER OF PAGES INCLUDING COVER: 9

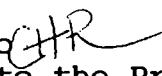
CC: Lisa Fairhall, Richard Green, Diana Fortuna, Lynn Margherio,
Joe Stiglitz, Debbie Fine

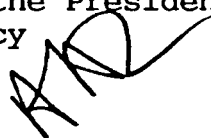
THE WHITE HOUSE

WASHINGTON

January 18, 1995

MEMORANDUM TO: Members of the National Disability Policy Review Team

FROM: Carol Rasco 
Assistant to the President for
Domestic Policy

Alice Rivlin 
Director
Office of Management and Budget

SUBJECT: Next Steps for the Review

We are writing to update you on the progress of the National Disability Policy Review.

At the end of November, the Review Team formed five work groups: Guiding Principles, Accommodations, Children's Issues, Employment of Working-age Adults and School-to-Work Transitions. Each of these groups has been meeting to begin to set goals and to identify short and longer-term policy objectives.

Based on your comments, we have revised the workplan which you will find attached. You will also find attached a request for agency program information on federal programs for people with disabilities. This will provide a critical baseline of information for the ongoing work of the Review. Please send a completed response to Lisa Fairhall (phone: 395-7766/fax: 395-4875) or Richard Green (phone: 395-7398/fax: 395-1596) at the Office of Management and Budget no later than January 27. Please contact either of them if you have any questions about content or format. OMB will compile the information and make it available to the Review Team in early February.

The next full Review team meeting will be held on February 22 from 2:00 - 3:30 pm in Room 248 Old Executive Office Building to review the final draft of the guiding principles.

Finally, you should be aware that Stan Herr has returned to the University of Maryland. The two DPC staff members who will be coordinating the staff work of the Review with Lisa and Richard are Lynn Margherio (456-5561) and Diana Fortuna (456-5570). You should feel free to contact either of them with any questions you may have.

PRELIMINARY WORK PLAN
Discussion Draft Only
National Disability Policy Review

January 18, 1995 -- Draft # 3

Background

In response to initial memoranda suggesting a National Disability Policy Review, the Domestic Policy Council received comments and input on the Review's proposed agenda and work plan. We have met with all the Departmental designees, first in small groups and twice as a full team. We have consulted key advocates in the disability community, Congressional staffers, the heads of three presidential advisory committees in the disability field, and other experts. In addition, we have made a presentation on the Review to the full membership of the President's Committee on Mental Retardation, reached out to the Administration's appointees with disabilities, and begun to obtain background policy papers.

Oral and written responses have emphasized that such a review is important, overdue, and should involve significant input from individuals with disabilities and their advocates. The comments also stressed the need to be realistic in setting goals and to focus on some shorter-term achievable objectives while simultaneously engaging in a long-term policy process.

On November 30th, the Review Team met to develop a proposed work plan for the first three months of the Review. On December 21, the Team met to discuss a set of Guiding Principles and additional progress to date. Based on the agreements reached at this meeting, we have revised our original draft of the work plan. The following pages outline a rewritten version highlighting the conclusions of both meetings and laying out the issue groups formed and specific assignments.

Work Plan

This draft Work Plan proposes two parallel tracks for work during the next three months. On the "Policy Track," work groups will meet and address the issues outlined below. At the same time, the "Consultation Track" will engage in outreach and coordination with the advocacy community, Congressional staff, and the Presidential advisory committees.

I. POLICY TRACK

A thorough review of all aspects of disability policy is an ambitious undertaking. Review Team members and those commenting from outside the Review have agreed that it is sensible to conduct the work in phases, initially focusing on a few discrete issues to make the work more manageable. To this end, the Review Team, at its November 30 meeting, formed five work groups: 1) Guiding Principles, 2) Accommodations, 3) Children's Issues, 4) Employment of Working-Age Adults and 5) School-to-Work Transitions.

1. *Guiding Principles* -- There was significant agreement that the Review would benefit from the early development of a set of principles articulating the values guiding the Review. This statement of principles will not predetermine the policies to be developed through the Review, but instead guide Review Team members and staff in their work. It might eventually become the preamble to the Review's final report, subject to continual modification along the way.

This work group has convened in December to draft an initial statement. The principles it develops should draw not only on Administration policy and statements and Presidential speeches, but on policies incorporated in recent legislation in this area. When the full Review Team met on December 21, a draft of this statement was discussed and reviewed. This work group is now in the process of revising the original draft in response to the input received on December 21 and in subsequent discussions.

Convenor: Bob Williams, Commissioner, Administration on Developmental Disabilities, Department of Health and Human Services.

2. *Accommodations* -- This work group will draw on the review process already in place through the *Federal Disability Accommodations Working Group*. Formed in August 1994 by the Domestic Policy Council, this group has begun to examine how the federal government can be a model of making reasonable accommodations that will benefit its customers, job applicants, employees, and the general public.

The work of this group should lead to short-term achievable administrative recommendations that help demonstrate the Administration's commitment in this area.

Convenor: Deval Patrick, Assistant Attorney General, Civil Rights Division, Department of Justice

3. *Childhood* -- This work group will examine educational, income benefit, and service programs available for children, from birth to age 18. Their work is particularly timely given the formation of the Childhood Disability Commission that will look at the SSI children's program. The group will focus on developing an administration policy that will anticipate and respond to the findings of the Commission and other actors. In addition, the Individuals with Disabilities Education Act (IDEA) is up for reauthorization this year and will certainly raise important policy issues.

Convenor: Judy Feder, Principal Deputy Assistant Secretary for Planning and Evaluation, Department of Health and Human Services.

4. *School-to-Work Transition* -- This work group will explore issues related to the transition to adulthood from education programs that serve people until they are 18 to 21 years of age. "Transitions" planning involves helping people to find employment, further schooling, independent or assisted living arrangements, and other activities that maximize their independence and potential.

Convenor: Judy Heumann, Assistant Secretary, Office of Special Education and Rehabilitative Services, Department of Education.

5. *Employment of Working Age Adults* -- All participants in this process have consistently agreed that employment must be a centerpiece of the Review. This work group will focus on the problems associated with the chronic unemployment and underemployment of persons with disabilities and review policy options for helping people enter -- and remain -- in the workforce.

Convenor: Susan Daniels, Associate Commissioner for the Office of Disability, Social Security Administration.

These groups are currently meeting and will eventually develop action steps in concert with the values and commitments identified in the *Guiding Principles* document. Additional work groups will be formed as appropriate throughout the process based on the findings of these initial working groups.

II. CONSULTATION TRACK

We will proceed on several fronts externally as the policy groups begin their work.

A. Presidential Committees

Each Presidential committee has designated or will soon designate a representative to participate on the Review Team, and we anticipate these committees will be integrally involved in the Review. We look forward to working with the Committees on shared policy concerns. In particular, we expect to coordinate with them in gathering public input on these policy questions, holding public hearings and conducting ongoing outreach efforts.

B. Advocacy Organizations

Each of the five groups referred to in the Policy Track discussion should meet with a wide range of organizations representing the interests of people with disabilities to give them the opportunity to provide information and input into their work. Each work group convenor will host a meeting with the advocacy community in order to update interested groups on the substance of the Review as it relates to that particular issue.

C. Legislative Bodies

We will also meet with legislative staff from both chambers and both parties to keep them apprised of the work of the Review.

III. AN ON-GOING PROCESS

This document is a working draft that we anticipate will undergo periodic change throughout the Review. It is an on-going process which will be modified in response to the findings of various work groups and input received from interested parties.

TIMETABLE

A timetable would be as follows:

November 30	Issue groups formed.
December 21	<u>Guiding Principles</u> : Draft discussed with full Review Team.
January 27	Agencies to submit program descriptions in response to request for agency program information.

Early February

Initial background papers completed.
Key policy questions identified.

Meeting with advocacy groups and the
five work group convenors.

Guiding Principles: Discuss draft
statement and options for obtaining
public input.

February 22

Third meeting of the Review Team to
review progress of issue groups and
discuss final draft of Guiding
Principles. Overall scope of work and
timetable for the entire Review to be
discussed.

March

Review Team meets to begin to outline
options for reforming disability policy
and identify next steps for each work
group.

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Agencies are requested to do the following:

1. A) Identify each program administered by the agency serving individuals with disabilities. Include all programs that:

- o provide direct Federal administered services or benefits to individuals with disabilities. These programs can either be targeted specifically for people with disabilities or they can serve larger populations, but provide benefits to persons with disabilities,
- o fund State, local, non-profit or private activities serving or benefitting individuals with disabilities,
- o mandate or regulate (without necessarily providing Federal funds for) State, local, non-profit or private behavior with regard to individuals with disabilities.

B.) On a separate list, identify all programs in for which there is an authorization of appropriations, but for which no funding was received in FY 1995, and where the program is not currently operated by the agency.

2) For each program identified in 1.A), provide the following information :

- o Agency, Bureau, Account, and Program Title
- o A short description of the program. Include program goals, funding mechanisms, authorized activities, eligibility criteria (including existence of and/or extent of disability, age, income), and any definitions of disability or other relevant terms (such as "impairment") established in law or regulations. Identify performance measures, if available. Provide title and citations of authorizing statute, and citations for implementing regulations.
- o Type of service or benefit provided:
 - a. cash,
 - b. medical,
 - c. vocational rehabilitation,
 - d. education or training,
 - e. research,
 - f. transportation,
 - g. housing
 - h. long term care
 - i. tax incentives
 - j. other (specify)

- o Number and demographics (e.g., age, socioeconomic status) of individuals with disabilities served, broken down by type of disability (e.g. using categories established by the program, for example physically disabled, chronically mentally ill), if available. If participation of individuals with disabilities is incidental (e.g. health-related research), but significant, provide the proportion of individuals with disabilities served relative to the total population served, if known. (If agency cannot estimate the proportion of individuals with disabilities served, so indicate.) Briefly describe any trends or changes in demographics of populations served, and explain.
- o Budget authority and Outlays for FY 1994, and FY 1995 (estimated), relative to individuals with disabilities served. (If agency cannot estimate the proportion relative to the number of individuals with disabilities served, so indicate, and provide program totals, or best estimate, with assumptions stated.)
- o Funding provided by non-Federal sources. (Provide break-out by entity.)
- o Nature and periodicity of data collected on services/benefits provided and populations served.
- o Roles of Federal and non-Federal entities in administering the program.
- o Major administrative and/or programmatic issues currently confronting the program.
- o Any other information about the program that would be important for policy decisions. (E.g., key advocacy groups, major Congressional supporters.)
- o Name, position, and telephone number of contact person for responsible for program information.

3) Program descriptions, and list of all identified programs, should be provided in hard copy and in Wordperfect format on a diskette. Please keep materials as brief as possible (no more than 4 pages per program), while responding in all categories.

66298

** Sylvia Walker
Linda On*

Susan Ames-Zierman
Executive Director
National Association of Developmental Disabilities Councils
1234 Massachusetts Avenue, NW
Suite 103
Washington, D.C. 20005
p-347-1234 f-347-4023

Mike Auburger
Co-Director
ADAPT
201 S. Cherokee
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814 Thayer Avenue
Silver Spring, Maryland 20910
p-301/587-1788 TDD-301/588-9551
f-301/587-1791

Bob Echlman
National Alliance for the Mentally Ill (NAMI)
2101 Wilson Boulevard
Suite 302
Arlington, Virginia 22201
p-703/524-7600
f-703/524-9094

Dan Bross, Executive Director OR
Aimee Berenson, Legislative Counsel
AIDS Action Council
Suite 700
1875 Connecticut Avenue, NW
Washington, D.C. 20009
p-986-1300 x.11 f-986-

Judi Chamberlin
Center for Psych Rehab
Boston University
730 Commonwealth Avenue
Boston, Massachusetts 02215
p-617/353-3549 f-617/353-7700

Justin Dart
Real Health Care for All
907 6th Street, SW
Apt. 516C
Washington, D.C. 20024
p-202/488-7684 TDD-202/484-1370

*Wendy**Carla
LAPAS**Bob (evergreen)
Linda
Julia**Wendy*

Curt Decker
National Association of Protection & Advocacy Systems (NAPAS)
900 2nd Street, NE, #211
Washington, D.C. 20002
p-408-9514

Steve Edelman
Kennedy Foundation
1325 G Street, N.W.
Washington, D.C. 20005-4709
p-824-0214 f-824-0200

Frederick Fay
President
Disability Rights and Voter Education
2054 Main Street
Concord, Massachusetts 01742
p-508/371-0992 f-508/369-5544

*used to be
able to send*

Jim Gashel
Government Affairs Director
National Federation of the Blind
1800 Johnson Street
Baltimore, Maryland 21230
p-410/659-9314 f-410/685-5653

Al Guida, Executive Director OR
Elizabeth Burrows
National Mental Health Association
1021 Prince Street
Alexandria, Virginia 22314-2971

Anne-Marie Hughey
Executive Director
National Council on Independent Living
2111 Wilson Boulevard
Suite 405
Arlington, Virginia 22201
p-703/525-3406 f-703/525-3409

Dr. I. King Jordan
President
President's Office
Gallaudet University
800 Florida Avenue, NE
Washington, DC 20002-3695
p-651-5005 f-651-5508

10/2/95

Joe Manes
Bazelon Center for Mental Health Law
1101 15th Street, NW
Suite 1212
Washington, D.C. 20005
p-467-5730 TDD-898-1670 f-223-0409

Gordan Mansfield
Executive Director/ Director of Advocacy
Paralyzed Veterans of America
801 18th Street, NW
Washington, D.C. 20006
p-872-1300 f-785-4452

Paul Marchand
Director, Government Relations
The Arc
1522 K Street, NW
Suite 516
Washington, D.C. 20005
p-785-3388 f-467-4179

Scott Marshall
Director, Governmental Relations OR
Denise Rozell, Government Relations Representative
American Foundation for the Blind
1615 M Street, NW
Washington, D.C. 20036
p-457-1487 f-457-1492

Arlene Mayerson
Legal Director
DREDF (Disability Rights Education and Defense)
2212 6th Street
Berkeley, California 94710
p-510/644-2225 f-510/841-8645

Patty McGill Smith
Executive Director
National Parent Network on Disabilities
1600 Prince Street
Suite 115
Alexandria, Virginia 22314
p-703/684-6763 f-703/836-1232

Chris Metzler
Senior Legislative Representative
American Occupational Therapy Association (AOTA)
1383 Piccard Drive
Rockville, Maryland 20849
p-301/948-9626

Oral Miller
Executive Director
American Council of the Blind
1155 15th Street, NW
Suite 720
Washington, D.C. 20005
p-467-5081 f-467-5085

*Red Wing at
loc 1*

*alt
p-467-5081*

Michael Morris
United Cerebral Palsy Associations
1522 K Street, NW
Suite 1112
Washington, D.C. 20005
p-842-1266 f-842-3519

Saber
Katy Neas
American Association of University Affiliated Programs (AAUAP)
8630 Fenton Street, #410
Silver Spring, Maryland 20910
p-301/588-8252

Becky Ogle
Project: AccessAbility
625 Sisters Lane, Suite 200
Alexandria, Virginia 22314-1171
p-703/836-6263 f-703/836-6730

Janet O'Keeffe
Public Policy Office
American Psychological Association (APA)
750 First Street, NE
Washington, D.C. 20002
p-336-5934

Ed Roberts
President
World Institute on Disability
510 16th Street
Oakland, California 94612
p-510/763-4100 (V/TDD) f-510/763-4109

won't come / can

Joseph Rogers
Director
National Mental Health Consumer Self Help Clearing House
311 South Juniper Street
Room 902
Philadelphia, PA 19107
p-215/735-2465, 6082 x.312 f-215/735-0275

Donna Sorkin
Executive Director
Self-Help for Hard of Hearing People
7800 Wisconsin Avenue
Bethesda, Maryland 20814
p-301/657-2248 f-301/913-9413

Peter Thomas, Esquire
AAPMR, ASIA, ACRM, ASOTAPA, ACA, NARRTC, NOD
1275 Pennsylvania Avenue, NW
3rd Floor
Washington, D.C. 20004
p-466-6550

Arthur Wilson
Executive Director
Disabled American Veterans
807 Maine Avenue, SW
Washington, D.C. 20024
p-554-3501 f-554-3581

Tony Young or
Pat Morrissey,
Vice President, Government Relations for Comm. Programs
American Rehabilitation Association (Amer. Rehab.)
1350 Eye Street, NW, #670
Washington, D.C. 20005
p-789-5700

Dr. George Zitnay
President
National Head Injury Foundation
1776 Massachusetts Avenue, NW
Suite 100
Washington, D.C. 20036
p-202/296-6443 f-202/296-8850

1/4/95