

MEMORANDUM FROM JEREMY BEN-AMI AND STANLEY S. HERR

TO: DESIGNEES TO THE NATIONAL DISABILITY POLICY REVIEW

DATE: December 20, 1994 -- Draft # 2

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 with all the Departmental designees, first in small groups and most recently 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. 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 meeting's conclusions and laying out the issue groups formed and concrete assignments to date.

Work Plan

work during

This draft Work Plan proposes ~~proceeding on~~ two parallel tracks for the next three months. On the "Policy Track" work groups will meet and address the issues outlined below. ~~The concurrent~~ "Consultation Track" will involve outreach and coordination with the advocacy community, Congressional staff, and the Presidential committees.

At the same time,

engage in

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 discreet 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 Transition.

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 be the preamble to the Review's final report, but ~~might also be significantly modified~~ along the way.

that would guide

subject to extensive modification

welcome
This group will convene in December to begin drafting 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 meets on December 21, a draft of this statement will be discussed and reviewed.

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 DPC, 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,
Department of Justice

3. *Childhood* -- This subgroup will examine educational, income benefit, and service programs available for children, from birth to age 18. This group is 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 and 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.
- will* *the subgroup will focus on developing*

Convenor: David Ellwood, Assistant Secretary, Planning and Evaluation, Department of Health and Human Services.

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

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

- overlap?*
5. *Employment of Working Age Adults* -- There has been consistent agreement that employment must be a centerpiece of the review. This subgroup 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 will meet and 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 would like to proceed on several fronts externally as the policy groups begin their work.

should on subject policy concerns

A. Presidential Committees

Each Presidential committee has designated a representative to participate on the Review Team, and we anticipate these committees will be integrally involved in the Review. We ~~hope~~ *look forward to working with* the Committees ~~will be interested in exploring the same policy areas as the Review Team and will work with us to gather public input on these policy questions, hold public hearings and conducting ongoing outreach efforts.~~

B. Advocacy Organizations

In particular, we expect to ~~work~~ ^{ing} coordinate w/ them in gathering --

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. 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 each issue area.

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.

III. AN ON-GOING PROCESS

Line *that*
This document is a working draft ~~which~~ *that* we anticipate will undergo constant change throughout the ~~Review~~. The ~~Review~~ must function as an on-going process in which its planning and direction can be modified in response to the finding of various work groups and input received from interested parties.

TIMETABLE

A possible timetable would be as follows:

November 30	Issue groups formed
December 21	<u>Guiding Principles</u> : Draft discussed with full Review Team
Early January	Initial work products available for review <u>Guiding Principles</u> : Draft statement and plan for public comment <u>Other Subgroups</u> : Draft scope of work and timetable for each subgroup

Second week January

THE WHITE HOUSE
WASHINGTON
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.

Meeting with advocacy groups and the 5 work group convenors.

Early February

Initial background papers completed. Key policy questions identified.

Review Team meets to determine what policy options each subgroup should pursue and how.

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Elizabeth

As of Dec. 2, 1994

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THE WHITE HOUSE

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December 7, 1994

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

SUBJECT: Meeting Announcement

The second full meeting of the National Disability Policy Review Team will be held on WEDNESDAY, DECEMBER 21, 1994, 2:00-3:30 p.m. in Room 248 of the Old Executive Office Building.

At this time, we will continue to discuss the over-all review process, and each work group will be asked to give a brief presentation of progress to date.

If you plan to attend, please contact Beverly Petchel at (202)456-5571 and provide her with clearance information (date of birth).

Thank you.

Distribution:

**** (STAFF LISTED IN PARENTHESIS WILL NOT RECEIVE AN ADDITIONAL FAX, PLEASE MAKE SURE THAT ALL AGENCY REPRESENTATIVES RECEIVE A COPY. THANKS!)**

Roberta Achtenberg
Bernard E. Anderson
Gary Blumenthal
Carolyn Colvin & Susan Daniels (Ken McGill, Diane Garro)
Speed Davis
Dennis Duffy
David T. Ellwood & Bob Williams (Wendell Primus, Robyn Stone)
Patsy Fleming (Jeff Levi)
W. Scott Gould (Ron Glaser)
Michael A. Grant
Judith Heumann (Amy Bennett, Connie Garner, Howard Moses)
James R. Lyons (Rick Grand)
Frank Kruesi (Nancy Ebersole, Ira Laster Jr.)
Fred Pang (Claiborne Haughton)
Larry Parks (Carolyn Gunney)
Deval Patrick (Liz Savage)

TOTAL NUMBER OF PAGES INCLUDING COVER: 1

CC: Alice Rivlin, Jeremy Ben-Ami, Lisa Fairhall, Richard Green,
Stan Herr

THE WHITE HOUSE

WASHINGTON

December 5, 1994

MEMORANDUM TO NATIONAL DISABILITY POLICY REVIEW TEAM

FROM: ~~Jeremy~~ Ben-Ami and Stanley S. Herr *SH*

SUBJECT: Work Group Assignments

Attached please find a list of the members of each work group. The convenor of each group will be contacting you to arrange for your subgroup's meeting. If one or more of your staff members will be involved in a particular work group, that person's name is listed in parenthesis.

If you are interested in participating in any of these groups, but did not have chance to sign up at the November 30th meeting, please contact Elisabeth Cohen at 202-456-2846.

Thank you for your participation in the National Disability Policy Review. We look forward to working with you.

Distribution:

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Deval Patrick (Liz Savage)

TOTAL NUMBER OF PAGES INCLUDING COVER: 3

CC: Carol Rasco, Alice Rivlin, Lisa Fairhall, Richard Green

NATIONAL DISABILITY POLICY REVIEW

WORK GROUP ASSIGNMENTS

December 7, 1994

Accommodations

Convenor: Deval Patrick/ Justice	514-2151
Patsy Fleming (Jeffrey Levi)/ ONAP	632-1090
W. Scott Gould (Ron Glaser)/ Treasury	622-2400 (622-1160)
Michael Grant/ OPM	606-2086
Fred Pang (Claiborne Haughton)/ Defense	703-697-2086 (695-0105)
Bob Williams/ HHS	690-6590
Larry Parks (Carolyn Gunney)/ Commerce	482-6055 (482-2779)

Children's Issues

Convenor: David Ellwood/ HHS	690-7858
Staff convenor: Robyn Stone/ HHS	690-6443
Carolyn Colvin (Diane Garro)/ SSA	410-965-4512 (965-3425)
Judy Heumann (Connie Garner)/ Education	205-5465
Laurel Illston/ OMB	395-7809
Larry Parks (Carolyn Gunney)/ Commerce	482-6055 (482-2779)
Wendy Taylor/ OMB	395-7316
Bob Williams (Wendell Primus)/ HHS	690-6590 (690-7409)

Employment of Working-Age Adults

Convenor: Susan Daniels/ SSA	410-965-3424
Bernard Anderson/ Labor	219-6191
Dennis Duffy/ VA	273-5615
Patsy Fleming (Jeff Levi)/ ONAP	632-1090
Michael Grant/ OPM	606-2086
Judy Heumann (Howard Moses)/ Education	205-5465
(Ken McGill)/ SSA	410-965-3988
Bob Williams (Robyn Stone)/ HHS	690-6590 (690-6443)

Guiding Principles

Convenor: Bob Williams/ HHS	690-6950
Robert Achtenberg/ HUD	708-4252
Susan Daniels (Ken McGill)/ SSA	410-965-3424 (965-3988)
Dennis Duffy/ VA	273-5615
Stanley Herr/DPC	456-5570
Judy Heumann/ Education	205-5465
Laurel Illston/ OMB	395-7809
Fred Pang (Claiborne Haughton)/ Defense	703-697-2086 (695-0105)
Larry Parks (Carolyn Gunney)/ Commerce	482-6055 (482-2779)
Deval Patrick/ Justice	514-2151
(Robyn Stone)/ HHS	690-6443

School-to-Work Transition

Convenor: Judy Heumann/ Education	205-5465
Staff convenor: Amy Bennett/ Education	205-8555
Bernard Anderson/ Labor	219-6191
Susan Daniels (Ken McGill)/ SSA	410-965-3424 (965-3988)
(Howard Moses)/Education	205-5465
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December 5, 1994

MEMORANDUM TO NATIONAL DISABILITY POLICY REVIEW TEAM

FROM: Jeremy Ben-Ami and Stanley S. Herr

SUBJECT: Work Group Assignments

Attached please find a list of the members of each work group. The convenor of each group will be contacting you to arrange for your subgroup's meeting. If one or more of your staff members will be involved in a particular work group, that person's name is listed in parenthesis.

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TOTAL NUMBER OF PAGES INCLUDING COVER: 3

CC: Carol Rasco, Alice Rivlin, Lisa Fairhall, Richard Green

NATIONAL DISABILITY POLICY REVIEW

WORK GROUP ASSIGNMENTS

December 7, 1994

Accommodations

Convenor: Deval Patrick/ Justice	514-2151
Speed Davis/ NCD	272-2004
Patsy Fleming (Jeffrey Levi)/ ONAP	632-1090
W. Scott Gould (Ron Glaser)/ Treasury	622-2400 (622-1160)
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Convenor: Bob Williams/ HHS	690-6950
Robert Achtenberg/ HUD	708-4252
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NATIONAL DISABILITY POLICY REVIEW

To do list: 1/24/95

I. Establishing Working Group

- Initial memos done
- Each agency has designated member (Fortuna to work with labor to designate new member)
- First round of meetings with review team complete
- Jen O'Connor (Cabinet Affairs), Debbie Fine, Mike Lux (Public Liaison), Tracey Thornton, Lorraine Miller (Legislative Affairs) and Joe Stiglitz (CEA) invited to all team meetings
- DPC meeting discussing review held on 11/21
- First Review Team meeting with Rasco, Sawhill 11/30, 2pm
 - * first 5 work groups established
 - * work groups first meetings held prior to 12/21
- Second Review Team meeting held 12/21, 2-3:30, rm 248
 - * guiding principles draft distributed and discussed
 - * draft 2 of work plan and list of advocates distributed
- Meeting of Work Group Convenors held 1/9, 3:15-4:15, rm 211
 - * Convenors to meet again to discuss guiding principles revisions prior to next meeting of Review Team
 - * Margherio & Fortuna working with Williams to continue guiding principles drafting process
- Request of agency information faxed to team on 1/18 with updated workplan and date of next team meeting
- Third Review Team meeting scheduled for Wednesday, February 22, 2:00-3:30, 248 OEOB

II. Outreach

A. Commissions

- * Counsel approved adding EEOC, PCED, PCMR & NCD designees
 - * EEOC, PCMR & NCD have designated participants
- Espinosa (PCED) Cohen scheduling meeting
- Bristo & Speed Davis(NDC)- meeting with Margherio and Fortuna on 1/26, 11:30 am, rm 207
- Blumenthal meeting with Margherio and Fortuna on 2/2, 11am

B. Advocacy

- Meeting of key groups held on 11/2, Herr coordinated
 - * advocacy list expanded (33 groups) through team comments, input of advocacy groups & public liaison
 - * Fortuna and Margherio to met with Debbie Fine (cc Mike Lux)
 - * Feder/Children's work group met with children's advocacy groups on 1/17
 - * meeting with convenors and advocacy groups to be scheduled in early February

C. Congress

- Met with Bobby Silverstein - input received
- Met with Maria Cuprill (staff director, Major Owens)
- Other key staff to be identified/ schedule meetings
- Thornton and Miller met with Ben-Ami, Fortuna &

Margherio on 1/12 at 3pm

III. Current Calendar
pre-November 7

	Finished agency meetings; commission calls
November 7	Agency reactions to initial outline
November 21	Work Plan presented to DPC
November 30	First meeting of Review Team
December-February	Background/ Issue papers prepared
December 21	Second meeting of Review Team
January 9	Meeting of Work Group Convenors
January 18	Agencies received request for program information
January 27	Agencies to provide Fairhall and Green with program information
Late January/	Guiding Principles revised
Early February	Meeting with Work Group Convenors and advocacy groups
February 22	Third meeting of Review Team

NATIONAL DISABILITY POLICY REVIEW

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NATIONAL DISABILITY POLICY REVIEW

To do list: 1/11/95

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- Initial memos done
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 - * draft 2 of work plan and list of advocates distributed
- Meeting of Work Group Convenors held 1/9, 3:15-4:15, rm 211
 - * request of agency information distributed by Fairhall and Green, input to be received by 1/11, to be sent to agencies with updated work plan by 1/13, Cohen and Fairhall updating work plan
 - * Fortuna and Margherio to draft letter from Rivlin and Rasco to accompany 1/13 mailing
 - * Work Group Convenors to meet again to discuss guiding principles revisions prior to next meeting of Review Team
 - * Fortuna working with Bob Williams to continue guiding principles process
 - * Fortuna and Margherio to contact Julie Demeo and Val to schedule next meeting of the team for mid-February

II. Outreach

A. Commissions

- * Counsel approved adding EEOC, PCED, PCMR & NCD designees
 - * EEOC, PCMR & NCD have designated participants
- Coelho - met on 10/28 - Fortuna/ Margherio to f/u re: designee and next meeting
- Bristo - called 10/27 - schedule next meeting
- Bradley - called on 10/27 or 10/28 - schedule next meeting

B. Advocacy

- Meeting of key groups held on 11/2, Herr coordinated
 - * advocacy list expanded (33 groups) through team comments, input of advocacy groups & public liaison
 - * Fortuna and Margherio to meet with Debbie Fine (cc Mike Lux)
 - * Fortuna and Feder planning meeting with children's groups
 - * meeting with convenors and groups to be scheduled in early February

C. Congress

- Met with Bobby Silverstein - input received
- Met with Maria Cuprill (staff director, Major Owens)
- Other key staff to be identified/ schedule meetings
- Thoton and Miller to meet with Ben-Ami, Fortuna & Margherio on 1/12 at 3pm

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 21	Work Plan presented to DPC
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Late January/	Guiding Principles revised
Early February	Meeting with Work Group Convenors and advocacy groups
Mid February	Third meeting of Review Team

J- please review main changes
which are highlighted - per
1/11 send to Lisa, Richard, Diana:
NATIONAL DISABILITY POLICY REVIEW
To do list: 1/10/94 5!

Lynn

- Ellis

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- First round of meetings with review team complete
- Jen O'Connor (Cabinet Affairs), Debbie Fine (Public Liaison), Mike Lux (Public Liaison), Tracey Thorton (Legislative Affairs) and Joe Stiglitz (CEA) invited to all team meetings
- All agencies wishing to make verbal or written comments on initial review memoranda & meetings have submitted
- DPC meeting discussing review held on 11/21:
- First Review Team meeting with Rasco, Sawhill 11/30, 2pm
 - * first 5 work groups established
 - * work groups: accommodations, children's issues, employment of working age adults, guiding principles & school to work
 - * groups first meetings held prior to 12/21
- Second Review Team meeting held 12/21, 2-3:30, rm 248
 - * guiding principles draft distributed and discussed
 - * draft 2 of work plan and list of advocates distributed
- Meeting of Work Group Convenors held 1/9, 3:15-4:15, rm 211
 - * request of agency information distributed by Fairhall and Green, input to be received by 1/11, to be sent to agencies with updated work plan by 1/13 or 1/16
 - * Work Group Convenors to meet again to discuss guiding principles revisions prior to next meeting of Review Team

II. Outreach

A. Commissions

- Bristo - called 10/27 - to be followed up with meeting with Fortuna, Margherio, Ben-Ami and Bristo
- Coelho - met on 10/28
- Bradley - called on 10/27 or 10/28

B. Advocacy

- Meeting of key groups held on 11/2, Herr coordinated
 - * advocacy list expanded (33 groups) through team comments, input of advocacy groups & public liaison
- Counsel approved adding EEOC/ commissions, FACA PCMR & NCD Review Team designees.
 - * EEOC, PCMR & NCD have designated participants

C. Congress

- Met with Bobby Silverstein - input received
- Met with Maria Cuprill (staff director, Major Owens)
- Other key staff to be identified/ schedule meetings
- Thoton and Miller to meet with Ben-Ami, Fortuna, & Margherio

III. Current Calendar

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Late January/	Guiding Principles revised
Early February	Meeting with Work Group Convenors and advocacy groups
Mid February	Third meeting of Review Team

NATIONAL DISABILITY POLICY REVIEW

To do list: 12/7/94

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- First round of meetings with review team complete
- Jen O'Connor invited to 10/26, 10/31, 11/1, 11/23 & 11/30 meetings (unable to attend)
- Debbie Fine, Public Liaison attended 11/2 & 11/30 meetings
- All agencies wishing to make verbal or written comments on initial review memoranda & meetings have submitted
- DPC meeting discussing review held on 11/21:
 - * preliminary work plan complete - faxed on 11/22
- First Review Team meeting with Carol, Belle 11/30, 2:00pm
 - * first 5 work groups established/ attendees signed up
 - * work groups: accommodations, children's issues, employment of working age adults, guiding principles & school to work - groups to meet prior to 12/21 - Stan to f/u - DPC to send representative to each meeting
- Second Review Team meeting with Carol & Alice scheduled for 12/21, 2-3:30, rm 248 - notices faxed on 12/7
 - * Bev coordinating clearance

II. Outreach

A. Commissions

Bristo - called 10/27 - to be followed up with meeting with Herr and Ben-Ami and Bristo

Coelho - met on 10/28

Bradley - called on 10/27 or 10/28

B. Advocacy

Meeting of key groups held on 11/2, Stan coordinated Elisabeth expanding advocacy list through team comments and help of advocacy groups, Stan, and Public Liaison

* Memo sent to counsel on EEOC/ commissions and FACA
PCMR & NCD have review team designees as of 12/6

C. Congress

* Met with Bobby Silverstein - input received

* Met with Maria Cuprill (staff director, Major Owens)

* Other key staff to be identified/ schedule meetings

* Re-group with Tracey/ house staff - Jeremy to f/u

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 21	Work plan presented to DPC
November 30	First meeting of Working Group
December - January	Background/ Issue papers prepared
December 21	Second meeting of Working Group
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list: 11/30/94

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- First round of meeting with review team complete
- Jen O'Connor invited to 10/26, 10/31, 11/1, 11/23 & 11/30 meetings (unable to attend)
- Debbie Fine, Public Liaison attended 11/2 & 11/30 meetings
- All agencies wishing to make verbal or written comments regarding initial review memoranda and meetings have submitted comment
- DPC meeting discussing review held on 11/21:
 - * preliminary work plan complete - mentioned at meeting
 - * preliminary work plan faxed on 11/22 - all received
- First Review Team meeting with Carol, Belle 11/30, 2:00pm
 - * first 5 work groups established/ attendees signed up
 - * work groups: accommodations, children's issues, employment of working age adults, guiding principles & school to work

II. Outreach

A. Commissions

Bristo - called 10/27 - to be followed up with meeting with Herr and Ben-Ami and Bristo
Coelho - met on 10/28
Bradley - called on 10/27 or 10/28

B. Advocacy

Meeting of key groups held on 11/2, Stan coordinated Elisabeth expanding advocacy list through team comments and help of advocacy groups, Stan, and Public Liaison

* Memo sent to counsel on EEOC/ commissions and FACA
(response expected by late afternoon on 11/30)

C. Congress

* Met with Bobby Silverstein - input received
* Met with Maria Cuprill (staff director, Major Owens)
* Other key staff to be identified/ schedule meetings
* Re-group with Tracey/ house staff - Jeremy to f/u

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 21	Work plan presented to DPC
November 30	First meeting of Working Group
December - January	Background/ Issue papers prepared
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list: 11/23/94

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- Met with all working group members (HUD, Commerce, VA, Defence, SSA, Treasury, Justice, HHS, Education & OPM meetings held pre-11/2 -- Trans, & Labor met 11/23) will continue to update USDA who could not attend meeting
- Jen O'Connor invited to 10/26, 10/31 11/1, and 11/23, 11/30 meetings (unable to attend)
- Reactions by November 7: *Comments from all agencies*
 - * OMP, HUD, Defense, Education, VA, SSA, Justice, HHS & *wishy* Labor received -- Commerce, Trans & USDA have no *formal* comments at this time -- Treasury made verbal *verbal or written* comments only *comments*
- DPC meeting discussing review held on 11/21:
 - * preliminary workplan complete - mentioned at meeting *received*
 - * preliminary workplan faxed on 11/22 - all received
- First Review Team meeting with Carol, Alice and designees scheduled for 11/30, 2:00pm - *rm 2480 EOB*
 - * notices out - Bev Petchel coordinating clearance *to revise workplan?*

II. Outreach *to SOB for assignments?*

A. Commissions

- Bristo - called 10/27 - to be followed up with meeting with Herr and Ben-Ami and Bristo
- Coelho - met on 10/28
- Bradley - called on 10/27 or 10/28

B. Advocacy

Meeting of key groups held on 11/2, Stan coordinated Elisabeth expanding advocacy list through team comments and help of advocacy groups, Stan, and Public Liaison

- * Memo sent to counsel on EEOC/ commissions and FACA *- EEOC F/U*

C. Congress

- * Met with Bobby Silverstein - input received
- * Met with Maria Cuprill (staff director, Major Owens)
- * Other key staff to be identified/ schedule meetings
- * Re-group with Tracey/ house staff - Jeremy to f/u

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 21	Workplan presented to DPC
November 30	First meeting of Working Group
December - January	Background/ Issue papers prepared
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list: 11/14/94

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- Meetings with all working group members scheduled or held pre-November 7
 - * HUD, Commerce, VA, Defence, SSA, Treasury, Justice, Education, HHS, OPM - done
 - * Trans and Labor re-scheduled - 8:30am, 11/23
- Jen O'Connor invited to 10/26, 10/31 and 11/1 meetings (unable to attend) invited to 11/23 mtg.
- Reactions by November 7:
 - * OMP, HUD, Defense received - following-up
- DPC meeting on 11/21:
 - * Notices/agenda sent out - Stan and Jeremy to discuss
 - * Jeremy re-drafting original memo - workplan prep
 - * OMB & DPC to discuss presentation to DPC
 - * DPC calling agencies to finalize presentations
- First Review Team meeting with Carol, Alice and designees scheduled for 11/30, 2:00pm

II. Outreach

A. Commissions

Bristo - called 10/27 - to be followed up with meeting with Herr and Ben-Ami and Bristo
Coelho - met on 10/28
Bradley - called on 10/27 or 10/28

B. Advocacy

Meeting of key groups held on 11/2, Stan coordinated
Names of advocacy groups - to be identified

C. Congress

- * Met with Bobby Silverstein - input received
- * Met with Maria Cuprill (staff director, Major Owens)
- * Other key staff to be identified/ schedule meetings
- * Re-group with Tracey/ house staff - Jeremy to f/u

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 21	Workplan presented to DPC
November 30	First meeting of Working Group
December - January	Background/ Issue papers prepared
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list: 11/2/94

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- Meetings with all working group members scheduled or held pre-November 7 (10 down; 2 to go)
 - * HUD, Commerce, VA, Defence, SSA, Treasury, Justice, Education, HHS, OPM - done
 - * Trans and Labor scheduled - 3:45pm, 11/7
- Jen O'Connor invited to 10/26, 10/31 and 11/1 meetings (unable to attend) invited to 11/7 mtg.
- Reactions by November 7
- DPC meeting on 11/14:
 - * OMB & DPC to discuss presentation to DPC
 - * DPC calling agencies to arrange presentation
- First Review Team meeting with Carol, Alice and designees tentatively scheduled for 11/30, 2:00pm

II. Outreach

A. Commissions

Bristo - called 10/27 - to be followed up with meeting with Herr and Ben-Ami and Bristo
Coelho - met on 10/28
Bradley - called on 10/27 or 10/28

B. Advocacy

Meeting of key groups held on 11/2, 10:30am, Stan Herr coordinated

C. Congress

- * Met with Bobby Silverstein - input received
- * Meeting with Maria Cuprill (staff director, Major Owens) scheduled for 8:30am, 11/4
- * Other key staff to be identified and meetings scheduled

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 14	Workplan presented to DPC
Late November	First meeting of Working Group
December - January	Background/ Issue papers prepared
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list

10/26/94

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- Meetings with all working group members to be scheduled pre-November 7 (4 down; 8 to go)
 - HUD, Commerce, VA, Defence - done
 - SSA, Treasury & Justice - 10/31, 3:30pm
 - Education, HHS, OPM - 11/1, 11am
 - Transportation and Labor being scheduled
- Jen O'Connor invited to 10/26, 10/31 and 11/1 meetings (unable to attend)
- Reactions by November 7
- First Meeting week after Thanksgiving

II. Outreach

A. Commissions

Bristo - scheduled Thurs 10/27
Coelho - reschedule
Bradley - reschedule

- materials Fed Ex'd to all three on 10/24

B. Advocacy

Meeting of key groups scheduled for 11/2, 11am, Room 211 - Stan Herr coordinating

C. Congress

Met with Bobby Silverstein - input received

Meeting with Maria Cuprill (staff director, Major Owens) scheduled for 8:30am, 11/4

Other key staff to be identified and meetings scheduled

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 14	Workplan presented to DPC
Late November	First meeting of Working Group
December - January	Background/ Issue papers prepared
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list

10/26/94

I. Establishing Working Group

- Initial memos done
- Each agency has designated member
- Meetings with all working group members to be scheduled pre-November 7 (4 down; 8 to go)
 - HUD, Commerce, VA, Defence - done
 - SSA, Treasury & Justice - 10/31, 3:30pm
 - Education, HHS, OPM - 11/1, 11am
 - Transportation and Labor being scheduled
- Jen O'Connor invited to 10/26, 10/31 and 11/1 meetings (unable to attend)
- Reactions by November 7
- First Meeting week after Thanksgiving

II. Outreach

A. Commissions

Bristo - scheduled Thurs 10/27 ✓ *called*
Coelho - reschedule *Fri - visited 10/28*
Bradley - reschedule, *called*

- materials Fed Ex'd to all three on 10/24

B. Advocacy

Meeting of key groups scheduled for 11/2, 11am, Room 211 - Stan Herr coordinating

C. Congress

Met with Bobby Silverstein - input received

Meeting with Maria Cuprill (staff director, Major Owens) scheduled for 8:30am, 11/4

Other key staff to be identified and meetings scheduled

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 14	Workplan presented to DPC
Late November	First meeting of Working Group
December - January	Background/ Issue papers prepared
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list

10/24/94

I. Establishing Working Group

- Initial memos done
- Has each agency designated a member?
 - What's up with Tran, Justice?
 - USDA was not an addressee of the memo?
- Meetings with all working group members to be scheduled pre-November 7 (2 down; 10 to go)
 - HUD, Commerce - done
 - Treasury, VA, Transportation, DoD, Justice, HHS, SSA, Labor, Education, OPM - being scheduled
- Invite Jen O'Connor to one of the meetings
- Reactions by November 7
- First Meeting week after Thanksgiving?

II. Outreach

A. Commissions

Bristo - scheduled Thurs 10/27
Coelho - reschedule
Bradley - reschedule

- Fed Ex materials to all three 10/24

B. Advocacy

Meeting of key groups to be scheduled in next week
or two by Stan Herr

C. Congress

Met with Bobby Silverstein

Other key staff to be identified and meetings scheduled

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 14	Workplan presented to DPC
Late November	First meeting of Working Group
December - January	Background/Issue papers prepared
Early-mid January	Status meeting of Working Group

NATIONAL DISABILITY POLICY REVIEW

To do list

10/24/94

I. Establishing Working Group

- Initial memos done
- Meetings with all working group members to be scheduled pre-November 7 (2 down; 10 to go)
 - HUD, Commerce - done
 - Treasury, VA, Transportation, DoD, Justice, HHS, SSA, Labor, Education, OPM - being scheduled
- Reactions by November 7
- First Meeting week after Thanksgiving?

II. Outreach

A. Commissions

Bristo - scheduled Thurs 10/27

Coelho - reschedule

Bradley - reschedule

B. Advocacy

Meeting of key groups to be scheduled in next week
or two by Stan Herr

C. Congress

Met with Bobby Silverstein

Other key staff to be identified and meetings scheduled

III. Current Calendar

pre-November 7	Finish agency meetings; commission calls
November 7	Agency reactions to initial outline
November 14	Workplan presented to DPC
Late November	First meeting of Working Group
December - January	Background/Issue papers prepared
Early-mid January	Status meeting of Working Group

APPENDIX: REPRESENTATIVES OF DISABILITY ADVOCACY GROUPS

Paul Marchand
Chair of CCD and Director Govt Relations for the ARC
785-3388

Justin Dart
488-7684

Pat Wright, Director Govt Relations
DREDF
986-0375

Becky Ogle
703/836-6263

Denise Figueroa, President
Ann Marie Hughey, Exec. Director
NCIL
703/525-3406

Nancy Bloch, Executive Director
National Association of the Deaf
301/587-1788

Scott Marshall, Dir. Govt Relations
American Foundation for the Blind
547-1487

OR

Oral Miller, Exec Director
American Council of the Blind
(more self-advocates)
467-5081

Judi Chamberlin
617/353-3549

Joe Manes
Bazelon Center for Mental Health
467-5730 x13

Al Guida, Exec Director
National Mental Health Association
703/838-7509

Dan Bross, Exec Director
AIDS Action Council
986-1300 x11

Draft - dont
Send out!!!

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 - February

Background

Following up on 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. While this discussion draft suggests possible ways of phasing the work, the key decisions of whether and how to stagger the work to 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 sub-groups 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 sub-groups 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, of course, 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 <u>Guiding Principles</u> : Draft statement and plan for public comment <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.
Early February	Initial background papers completed. Key policy questions identified. Review Team meets to determine what policy options each subgroup should pursue and how.

DRAFT
11/21/94

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

Background

Following up on initial memoranda suggesting a National Disability Policy Review, Domestic Policy and OMB staff have received comment 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.

In general, response to the idea of the Review has been quite favorable. 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 at others. While this discussion draft suggests possible ways of phasing the work, we wanted to leave the key decision of whether and how to stagger the work to the Team for discussion on the 30th. However, at that meeting, we do hope that 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 ages can be looked at holistically. There are at a minimum, three clear sub-groups 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, ages 0-18. 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 responds to, and builds on, the findings of the Commission. Also, the Individuals with Disability 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, 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 sub-group 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 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, eligibility, services, and consumer information

A more complete list of potential issue clusters appears on pages 2 and 3 of the September 30 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 focus. A "work/employment" subgroup might, for instance, look somewhat similar to the "Adulthood" group above, but would have a tighter, narrower focus.

There is also no reason why the Team could not choose to adopt some of Framework A and Framework B approaches and form some "Life Cycle" groups and some issue groups.

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, of course, 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.

C. 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 Commissions

We will continue to work closely with the Presidential commissions to provide them the opportunity to be integrally

involved in the Review. We hope the Commissions 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

Guiding Principles: Draft statement and plan for public comment

Other Subgroups: Draft scope of work and timetable

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 to be discussed.

Early February

Initial background papers completed. Key policy questions identified.

Review Team meets to determine what policy options each sub-group should pursue and how.

DRAFT
11/19/94

PRELIMINARY WORK PLAN
National Disability Policy Review
December - February

Background

Following up on initial memoranda suggesting a National Disability Policy Review, Domestic Policy and OMB staff have received comment 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.

In general, response to the idea of the Review has been quite favorable. 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 proposed the following work plan for the first three months of the Review. It is clear that we need to conduct our work in phases, choosing carefully the issues for initial focus and those that can come at a later date. As stated above, this draft is intended for discussion and significant modification at the first Review Team meeting on November 30th. However, at that meeting, we do hope that 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

We propose that the Review Team form several interagency policy groups, each chaired by a member of the Review Team, which any Review Team member may join. As this is an open-ended Review, we will be able to form as many such groups as we want throughout the Review, whenever it is 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. For the initial phase of the review, we would suggest the following policy groups:

A. Guiding Principles

There was significant agreement that the Review would benefit from the development of an up-front set of principles articulating the values guiding the Review. This document would not predetermine the policies to be developed through the Review, but instead would guide Review Team members and staff in their work.

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.

This should be a short document not a lengthy discourse. The group drafting it should consult all Review Team members and broadly with consumers and advocates. This group should, in addition, to producing a draft for comment by the Review Team, propose a mechanism for obtaining broad public comment such as through publication in the Federal Register or other means of reaching the disability community in particular.

B. Work and Preparation for Work

There was very broad interest in having work and employment a central and early focus of the Review. A policy group in this area would examine 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.

Specifically, the group would

- o catalog all federal policies and programs that impact the ability of persons with disabilities to enter the workforce
- o examine what the programs are supposed to do, who they serve and how, and most important whether they are achieving the result they are supposed to
- o include mainstream programs in their review and examine why and how those programs are not meeting the needs of this population.

This group would begin its work as a quasi-program audit team and would then provide policy options for program reform. The goal of the first phase (see timeline below) would be to complete the audit and then advise the Review Team how best to move ahead with developing policy options.

C. Federal Disability Accommodations

A few months back, the DPC formed a Federal Disability Accommodations Working Group, whose work should be folded into the Review. The Accommodations Group 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.

D. Other

We suggest that the Review Team agree on the 30th to create at most one or two additional groups, and possibly none at this time. We suggest that the Team choose areas which lend themselves to near-term, administrative rather than legislative recommendations.

The following areas were suggested in comments:

- o Transition from school to adulthood - a small group has been meeting on this topic, addressing not only employment but other forms of activity
- o coordination of various advocacy, information, and referral services aimed at helping people with disabilities
- o administrative coordination of programs, possibly focussed on advocacy, information and referral, possibly on for instance, program applications, eligibility, definitions

- o technology issues
- o children - focusing on coordinating work with the new Children's Disability Commission and a response to it.

Timetable

Timetables would be as follows:

November 30	Issue groups formed
Early January	Initial work products available for review <u>Guiding Principles</u> : Draft statement and plan for public comment <u>Work</u> : Initial catalog of programs <u>Accommodations</u> : Draft recommendations <u>Other</u> : TBD
Second week/January	Second meeting of the Review Team to review progress of issue groups and discuss draft of Guiding Principles
Early February	Background issue papers complete. Key policy questions identified. Review Team meets to determine what policy options each issue group should pursue and how.

II. CONSULTATION TRACK

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

A. Presidential Commissions

We will continue to work closely with the Presidential commissions to provide them the opportunity to be integrally involved in the Review. We hope the Commissions 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.

THE WHITE HOUSE

WASHINGTON

October 27, 1994

MEMORANDUM TO NATIONAL DISABILITY POLICY REVIEW MEMBERS

From: Stan Herr
Jeremy Ben-Ami
Lisa Fairhall
Richard Green

Subject: Initial Steps for the Review

Over the course of the next two weeks, we will be meeting with you individually or in small groups to initiate the National Disability Policy Review that Carol Rasco and Alice Rivlin have requested. We intend to present an initial outline of a workplan for the Review at the Domestic Policy Council's meeting on November 14, and to have the first meeting of the full Review Working Group by the end of November.

The following is a rough outline of a plan for the next six months:

Groundwork

By the meeting of the Working Group at the end of November, we hope to have:

- o Established a framework for the Review, identifying a series of policy areas in which staff work will begin. A preliminary list of these areas can be found on pages 2-3 of our September 30 memo to Carol Rasco and Alice Rivlin;
- o Assigned lead roles in each area to different members of the Working Group, who in the following months would be responsible, with their staff, for preparing background papers and identifying key policy questions and issues to be addressed in the Review. To the extent possible, we intend to encourage a multi-agency team approach in tackling individual issues;
- o Met with key Congressional staff, Presidentially appointed Commissions, and outside advocacy organizations to inform them about the Review and to solicit their input into the Review process. We will be inviting them to submit background information, questions, and issues within the same framework that we use to organize the work of the Review.

PHASE I - Information Gathering/Framing the Issues

The first phase of our work, beginning in early December, and lasting 2-3 months will involve:

- o developing a statement of principles to guide the Review;
- o preparing background papers which, as discussed above, provide background information and identify key policy issues to be addressed;
- o soliciting and collecting information from external groups and individuals who wish to contribute to the background information at the disposal of the Working Group.

PHASE II - Development of Options

Beginning early next year, Working Group members will present their initial work to the Group as a whole which will then frame the overall vision to guide the Review. The Group will then identify policy options in each issue area which staff will be assigned to analyze and develop in more detail. These options will include short term actions that can be achieved administratively as well and longer term options requiring legislative action.

NEXT STEPS

We would greatly appreciate your input by November 7 on the following:

- o Reactions to the initial memoranda outlining the review
- o Suggested modifications, additions, deletions of issues to be examined (the issue list in the September 30 memo)
- o Suggestions about Congressional staff, leaders in the advocacy community, other outside experts who should be consulted in the early going of the Review
- o Thoughts about the workplan outlined above for the next six months

Our goal is to have your input and feedback by November 7 so it can be reflected in the presentation to the Domestic Policy Council on the 14th. There will be plenty of time for further discussion of all these items, particularly at the first meeting of the Working Group in late November.

National Disability Policy
October 27, 1994
Page 3

We also ask that you begin to consider how your agency will best be able to support this Review effort. A quality review of the issues discussed above will require a commitment of staff and time from each of the agencies involved. We intend to designate Review Team members as leads in each of the issue areas, and they will need to find the staff or other resources through their agencies to produce the papers and analyses required.

We have attached a list of the Review Team members designated by the Secretaries. We will also be sending a list of the advocacy organizations with whom we are planning to meet.

Thank you very much in advance for your help. We look forward to meeting with all of you individually prior to November 7, and to getting your feedback and input as we begin this ambitious undertaking.

THE WHITE HOUSE
WASHINGTON

November 21, 1994

MEMORANDUM FOR DISABILITY POLICY REVIEW TEAM

FROM: Carol H. Rasco, Assistant to the President
for Domestic Policy *CHR*
SUBJECT: Meeting Announcement

The first full meeting of the National Disability Policy Review Team will be held on WEDNESDAY, NOVEMBER 30, 1994, 2:00-3:30 p.m. in Room 248 of the Old Executive Office Building.

At this meeting, we plan to follow up on the discussions at the Domestic Policy Council meeting on the 21st as well as your individual discussions with our staff to develop a concrete work plan for the next few months. At this meeting, we will break into a few work groups and make some specific assignments. Please

RSVP to Beverly Petchel at (202)456-5571 and provide her with clearance information (date of birth).

Thank you.

Distribution:

TO: FAX (9-708-4483, Roberta Achtenberg)
TO: FAX (9-219-8457, Bernard E. Anderson)
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TO: FAX (9-632-1096, Patsy Fleming)
TO: FAX (9-720-4732, James R. Lyons)
CC: Lisa B. Fairhall
CC: Richard E. Green
CC: Jeremy D. Benami
CC: Stanley S. Herr

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 <u>Guiding Principles</u> : Draft statement and plan for public comment <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.
Early February	Initial background papers completed. Key policy questions identified. Review Team meets to determine what policy options each subgroup should pursue and how.

THE WHITE HOUSE
WASHINGTON

November 21, 1994

MEMORANDUM FOR DISABILITY POLICY REVIEW TEAM

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CC: Lisa B. Fairhall
CC: Richard E. Green
CC: Jeremy D. Benami
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(revised 11/16/94)