
ECONOMIC
ENGAGEMENT:
AN AVENUE TO
EMPLOYMENT FOR
INDIVIDUALS WITH
DISABILITIES

OCTOBER 2004 ■■

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UNIVERSITY OF MASSACHUSETTS BOSTON



**Economic Engagement:
An Avenue to Employment for Individuals with Disabilities**
A preliminary report of a panel of experts on employment systems

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October 2004

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The authors wish to acknowledge the contributions of Stephen Knapp and Carey Appold at the Centers for Medicare and Medicaid Services (CMS), Jaimie Timmons and Danielle Dreilinger at ICI, and Michelle Willis at Medstat for their contributions to this effort.

The information and opinions contained in this publication are those of the authors and do not necessarily reflect those of CMS.

This report is funded by a contract from the Centers for Medicare and Medicaid Services in conjunction with Medstat.

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Table of Contents

I. Background to Employment Issues for CMS Participants	5
A. CMS and Employment	5
B. Developing a National Perspective on Employment.....	7
C. Overview of the Panel of Experts Meeting	8
II. Economic Engagement: Bringing All Sectors Together	11
A. Key Principles	11
B. Key Themes	12
i. Economic engagement	13
ii. Workforce participation	15
iii. Universal design	17
iv. Flexibility	18
v. Simplicity	19
vi. Individualization	20
vii. Innovation	21
viii. Leadership.....	23
ix. Combining resources (public, private and individual)	23
x. Technology	24
xi. Outcome-driven	26
xii. Incentives	26
III. Summary of Lessons Learned in Comprehensive Employment Options.....	27
Appendix A	
List of Participants	29
Appendix B	
Agenda.....	31
Appendix C	
References	33

Economic Engagement: An Avenue to Employment for Individuals with Disabilities

The role that employment has played for persons with disabilities over the past several decades has moved from one of no engagement in the workforce to a realization that persons with disabilities can work and are interested in working. The shrinking workforce has increased employers' interest in looking at the full range of potential workers, including those previously considered unemployable. The growing economy—coupled with the declining birth rate, the increase in technology and supports for a diverse workforce, and the increasing expectation that all persons should be provided with the opportunity to work—has led to a new view of individuals with disabilities. Many persons with disabilities perceived as not able to seek employment were not included in the unemployment statistics of the U.S. Department of Labor and thus were not counted as part of the available workforce. Labor force participation rates of persons with disabilities are less than one-third of those without disabilities.

Legislative and administrative initiatives in the past ten years have stressed equality of opportunity and workforce participation of persons with disabilities as a high priority. As in the case of welfare reform, the focus has moved to employment as a realistic and preferred goal for many persons with disabilities. In response to these initiatives, the Centers of Medicare and Medicaid Services (CMS), the primary health care resource for many persons with disabilities, has sought to support states in their effort to assist persons with disabilities interested in working to gain employment. The expansion of the Medicaid Buy-In and the passage of the Ticket to Work legislation (TTWWIIA) have both been directed at addressing some of the major barriers to employment for persons with disabilities. The Medicaid Infrastructure Grants (MIGs) encourage states to review and revise their health coverage practices to support persons with disabilities to enter and remain in employment. Through the expansion of the MIG initiative, CMS has encouraged states to develop supports and services that will enhance employment access and job retention for persons with disabilities.

I. Background to Employment Issues for CMS Participants

A. CMS and Employment

"As public policy has increasingly emphasized employment for people with disabilities, several federal statutes and initiatives have emerged that attempt to expand Medicaid's role in making it easier for adults with disabilities to work" (Sullivan, Gilmore, & Foley, under review). These initiatives include Section 1619 of the Social Security Act, which created the option for working Social Security recipients to retain their benefits and Medicaid coverage with reduced or no cash payment up to a certain earnings level (SSA, 2004); the Balanced Budget Act and TTWWIIA, which allowed states to expand health care coverage to working individuals with disabilities (i.e.,

Medicaid Buy-In under TTWWIIA and BBA); and the MIGs that support states in their efforts to develop employment-related health supports. In addition, the Workforce Investment Act (WIA) and the State Partnership Systems Change Initiative created opportunities for Medicaid agencies to get involved in interagency collaboration both at the state and local levels (Sullivan et al., 2004).

The findings of the 2001 Institute for Community Inclusion (ICI) survey of 37/50 Medicaid agencies reflect the placement of employment for people with disabilities on the agenda of these agencies. The majority of the respondents (72%) reported that employment of individuals with disabilities constituted a priority for their agency. This is an interesting finding considering that employment is not the primary mission of Medicaid (CMS, 2004b). However, the impact of the Buy-In initiatives on both employment and earnings remains unclear. The absence of rigorous examination of the impact of the Buy-In on employment leaves only descriptive evidence supporting its effectiveness on employment for individuals with disabilities (Goodman & Livermore, 2004). The relative newness of this effort must be taken into consideration when seeking evidence on this program's impact on employment.

As mentioned previously, the Medicaid Buy-In program is the flagship of CMS and its efforts to better meet the needs of working individuals with disabilities. As of December 2002, twelve states had implemented Medicaid Buy-In programs under the Ticket to Work legislation, enrolling over 24,000 working individuals with disabilities (General Accounting Office, 2003). More recent data note that now more than 29 states have implemented some form of Buy-In (Goodman & Livermore, 2004). Enrollment varied substantially across states, ranging from two individuals in Wyoming to 16,508 in Missouri (Goodman & Livermore, 2004). As a result of the flexibility allowed by the legislation, states varied in regard to income eligibility levels, which ranged from 100 percent of the federal poverty level in Wyoming to no income limit in Minnesota (General Accounting Office, 2003). A similar picture emerged when looking at cost-sharing provisions. The majority of states included in the study conducted by the General Accounting Office (2003) required their participants to buy in via monthly premiums, which ranged from \$26 to \$28 a month, and/or co-payments, which ranged from fifty cents to three dollars a month for office visits and prescription drugs.

Recent initiatives such as the Demonstration to Maintain Independence and Employment grant program, established by Congress under Section 204 of TTWWIIA, reflect CMS's continued emphasis on employment for those persons with disabilities served by states and supported by CMS funding. The purpose of this initiative is "to demonstrate whether and how the provision of medical assistance and related services can assist individuals with potentially disabling conditions to remain employed and independent of the income assistance program" (CMS, 2004c).

Despite these initiatives, there still is room for Medicaid to expand its role in supporting working individuals with disabilities. The 2001 ICI Survey of Medicaid agencies found that these agencies

were only moderately involved with disability and employment focused agencies (Sullivan et al., 2004). One-third to one-half of the respondents reported being involved in their state Workforce Investment Board and/or implementing a Medicaid Buy-In option for working individuals with disabilities. Medicaid agencies tended to collaborate more with poverty and welfare agencies than with disability or employment-focused agencies.

B. Developing a National Perspective on Employment

In the previous year, CMS published a solicitation addressing some of the key issues in the design of a comprehensive employment system. As a result of the responses received, CMS felt that there was a need to offer more guidance to states in the coming year particularly around what principles and themes should be taken into consideration as states design an employment system that will respond to the needs of persons with disabilities. In response to this need CMS contracted through MEDSTAT with ICI, seeking assistance in identifying some of the core principles and key themes that should be considered as states develop such an employment system.

In response to this request, ICI identified a number of generic employment and training systems leaders, businesses and employer associations with a track record of employing individuals with disabilities, and people experienced in providing employment supports to persons with disabilities. The initial list reflected people who had: been published in the field of employment and training generally and disability employment specifically; served as leaders developing demonstration programs in the area of employment of persons with disabilities; represented employer organizations or associations; represented agencies and/or organizations serving persons with disabilities; engaged in the field of workforce development; or had a disability themselves. Forty individuals were identified as potential participants for the panel of experts to define key elements of an employment system at the state level.

Contact with each of those identified was made by a staff member from ICI. Of the 40 people identified, 90% indicated a strong interest in participating in such a meeting. The target goal was to have from 15 to 20 experts attend such a meeting. Given individual scheduling conflicts as well as other demands upon potential participant times, a total of 16 individuals committed to attend. Formal invitations and an overview of the intent of the meeting were sent to all attendees.

This report summarizes the findings of a panel of experts convened by CMS and charged with identifying key strategies that would support increased workforce participation by persons with disabilities served and supported through state-based Medicaid Buy-In programs. The following summary outlines those key areas identified by this panel of experts.

C. Overview of the Panel of Experts Meeting

The meeting was held on February 9 and 10, 2004 in the greater Baltimore area (see Appendix A for a list of participants). The one-and-a-half-day meeting incorporated a semi-structured format that was facilitated by ICI staff. The discussions produced notes as well as a verbatim transcript. See Appendix B for the agenda.

The present structure of employment programs for persons with disabilities places the focus on the relationship between the individual and the programs providing services. The panel of experts stressed the importance of shifting the focus to the relationship between the individual and the employer. This is a critical point that has wide-ranging implications for how services are designed and delivered. The existing disability program structure emphasizes issues such as program eligibility, assessment of individual issues, case management, and coordination among programs. The connection to employers and businesses is made through the disability programs rather than directly with workers and employers.

In response to the perceptions of the panel of experts and numerous documents describing human service systems, ICI staff sought to develop a concept of employment for all job seekers, employers, and society in general. The larger framework of economic growth within a community includes economic engagement as well as financial development. The latter deals with the development of financial capital and technology for expansion; the former deals with human capital and was the central focus of this panel of experts meeting. Economic engagement, reflecting both workforce participation and workforce development, offers a more generic concept embracing both the employer's needs for a skilled workforce and the job seeker's needs for an increased emphasis on access to employment.

*The **economic engagement** concept integrates workforce participation activities with workforce development efforts, linking job seeker preferences with employer expectations. The intent of this concept is to ensure engagement by job seekers and employers in the economic growth of the community. In this concept, initial access and job advancement programs lead to increased self-sufficiency for the employee. The employer benefits from the expansion of the labor pool leading to increased profitability.*

This economic engagement concept places the focus of the relationship between the individual and employer, which is consistent with the spirit of the expert panel's suggestions. The goal is to create and maintain a direct interactive relationship that results in mutual gain for both the

individual with a disability and the employer. It is understood that the generic description of the employer/employee relationship is intended to reflect a wide array of employment arrangements.

Services, accommodations, and technologies that are utilized by the employee and employer to support their relationship must be driven directly by their needs and be supplied in ways that help achieve their economic goals. Whenever possible the supports to the job seeker should be designed within the context of the economic engagement concept, utilizing the internal business resources and employer benefit networks. When it is beneficial to incorporate external supports and services, they should be designed in ways that complement the business and employee relationship. Disability agencies and providers should be silent partners of both the individual and the employer.

The tone of discussion among the experts was that too often disability programs have actually been impediments to economic engagement. There is a clear need to avoid entangling individuals with disabilities and employers in the array of webs generated by disability systems. While employers focus on maintaining a highly productive workforce and profitability, disability programs often focus on protecting benefits and minimizing risk for the individual.

The primary issue is how the concept of workforce participation is viewed regarding individuals with disabilities.

- Is economic engagement seen as a dangerous activity that is fraught with risk, potential significant losses, and stress? OR
- Is economic engagement viewed as a major opportunity and primary source of financial and personal success for job seekers?

Again and again the expert panel expressed the need for higher expectations for economic success.

Though the two views of the nature of workforce participation presented above are oversimplified, there is a growing awareness that disability programs are structured so that risk-taking is avoided, security is the goal, and relationships with employers are approached in timid and cautious manners. The irony is that this dynamic actually limits economic engagement and is inconsistent with the goals that many programs espouse: inclusion, community membership, choice, and self-sufficiency. This discussion raises the question: What would a capacity-focused system that maximizes the interrelationship between the individual and the employer for mutual benefit look like?

The principles that emerged from the panel of experts assist all persons to achieve maximum workforce participation, increase economic self-sufficiency, and provide a broader labor pool for employers. Some of the key principles discussed by the panel were as follows.

- Employment systems must appeal to a wide audience—not only the disability audience
- Universal design principles can address the diverse audience of job seekers and businesses
- A strong, clear expectation for employment is the goal, with increased economic self-sufficiency the desired outcome
- A comprehensive, ongoing approach to supporting workforce participation must meet worker and employer/business expectations
- An economic safety net, including health care and related needs, must be available to workforce participants
- Results provide economic benefits for the individual, business, and community
- Individualization and flexibility in design must be able to support both employee and business goals

The group was very clear about the critical advantage of having a system that embraces flexibility in how supports are delivered and financed. This flexibility occurs while the worker and employer lead the process so that supports are responsive to their mutual goals and serve to strengthen their relationship. As pointed out by an expert from the insurance industry:

There is continuous innovation in the approaches being utilized to address the needs of businesses and workers. The methods of providing and accessing health care benefits, education and training, retirement savings, child care, family care, wellness, and an ever-expanding menu of other supports are developing at a rapid rate. The economic structure is changing to reflect diversity in the global economy and its workforce.

Key elements within many of these efforts to innovate include individualization, portability, opportunities for asset development, pooling of resources, continuous learning, cost-benefit justifications, and choice. A comparison of these "business" approaches utilized by for-profit industries with those being explored in disability programs and services demonstrates significant similarities.

Business	Human services
Individualization	Person-centered planning
Individual and business portability	Consumer control/personal budgets
Financial incentives/retention of earnings	Asset development
Human capital development	Career advancement

Given these parallels, the opportunities to design effective strategies for workforce participation and workforce development are significant.

The lack of knowledge and understanding of economic engagement and the interaction of its key elements (workforce development and workforce participation) by disability providers, advocates, and public agencies is a chronic issue. In addition, businesses' limited understanding of people with disabilities as potential employees has a detrimental impact on the ability to develop approaches that support a more extensive employment strategy.

It was that lack of knowledge that led CMS to seek advice from experts on both sides: disability services and business. The following section summarizes the key principles that emerged as a result of this panel of experts and presents the themes that must be addressed to develop an employment system at a state level that will enhance the employment of persons with disabilities.

II. Economic Engagement: Bringing All Sectors Together

A. Key Principles

If an employment system is to design services and supports via an economic engagement concept, a series of principles must be considered. These principles describe the necessity for such a system to recognize the needs of all job seekers, acknowledge the need for flexibility in developing options that can support job access and job retention by all potential job seekers, and expect that persons with disabilities can and must be part of the emerging workforce of the 21st century and beyond. The core principles are:

- Persons with disabilities are part of the workforce
- Persons with disabilities do participate in all economic and workforce activities
- The economy requires the inclusion of all persons in the workforce
- Programs and services respond to the needs of the worker as well as the employer
- Workforce development and workforce participation are interdependent

These principles acknowledge the connection between workforce participation and workforce development. For the job seeker, engagement in work must lead to earnings, benefits, and a route to financial self-sufficiency in future years. Earnings alone will not guarantee self-sufficiency; such earnings must be coupled with opportunities for asset accumulation. Workforce development recognizes that if the economy is to grow and prosper then there must be a workforce that can meet business needs in a way that allows businesses to grow and prosper. When considering the outcomes of both workforce participation and workforce development there are short-term measures such as wages and profits as well as long-term measures like asset accumulation and profitability) that emerge and form the cornerstone of an economic

engagement concept. This concept recognizes and addresses the needs and expectations of the job seeker, employer, and society in general.

When considering employment for persons with disabilities, the goal has been a job with little focus on the long-term options of individual career growth and financial stability. An employment system must recognize not only the short-term outcomes but the long-term ones as well. The acknowledgment of the principles noted above calls for a recognition of the relationships between the long- and short-term needs of the job seeker with a disability as well as those of the business. Developing employment strategies requires that change be considered at the system, individual, and general community levels. The following section outlines some of the key themes that must be taken into account as states develop such an employment system. These themes serve as a basis for areas of consideration. Each theme is outlined and followed by a series of representative questions that can be weighed by states as they evolve their employment strategies for individuals with disabilities.

B. Key Themes

The themes are not intended to be recommendations, or for that matter a road map or blueprint. Rather, they offer states a platform upon which they can reconceptualize their approach to enhancing employment for persons who are served through the Medicaid program. The goal of the panel of experts was to provide CMS with sufficient materials and perspectives to assist the agency in structuring its efforts to encourage states to develop a broad system of employment in future years.

The themes presented here reflect what the participants felt were critical elements that would have to be either addressed or present at a state level if a broad employment system were to be developed. The presentation of the themes reflects some of the components that a state could or should consider in addressing a systemic change effort. It was apparent to the participants that developing a comprehensive system would require a wide-ranging commitment, recognizing that while agencies play multiple roles those roles could not be undertaken in isolation. Additionally, beyond just public agency involvement, effective systemic change requires partnerships across agencies, across entities both public and private, and across groups of providers, employers, and job seekers.

An extensive employment system must focus on the involvement of persons with disabilities in economic engagement activities at all levels: federal, state, and local. While policies may be developed at a national or state level, the actual implementation of employment programs is an activity involving local resources: job seekers who have disabilities, employers who need workers, employment and training professionals who can facilitate matches, and the general public who benefits from a stronger economy. At the federal level most policies are enabling and encouraging; at the state level, they are directing and expecting; at the local level, they are

practical and useful. The interrelationship between national, state, and local levels mandates clarity and consistency of message. The message that employment is not only achievable but expected is one that needs to be continuously reinforced through all policies and practices. The themes are presented below, with each further elaborated in the paragraphs to follow.

Themes

- ◆ Economic engagement
- ◆ Workforce participation
- ◆ Universal design
- ◆ Flexibility
- ◆ Simplicity
- ◆ Individualization
- ◆ Innovation
- ◆ Leadership
- ◆ Combining resources (public, private & individual)
- ◆ Technology
- ◆ Outcome-driven
- ◆ Incentives

i. Economic engagement.

An inclusive employment system must be built upon a clear understanding of the economic opportunities and potential in the state and local communities. The development of training programs addressing low-demand occupations will not result in jobs for persons with disabilities. In a parallel fashion, the pursuit of job interests not present in the local workforce will not result in employment of persons with disabilities. Workforce development must address the needs and interests of all: the worker, the employer, and the community.

Recognizing the need for success among all stakeholders will result in the ability to construct an employment strategy that reflects the needs of the local business community as well as the full labor force. This is a significant shift in perspective. It moves from a goal of seeking a place for persons within an economic structure to expecting that all job seekers, including persons with disabilities, are already part of this economic structure. As noted earlier, an economic engagement concept addresses the interests of the job seeker (workforce participation) and the needs of the employer (workforce development) leading to jobs that offer wages, benefits, and career development opportunities.

Workforce development and workforce participation activities are interwoven with the essential components of economic engagement and cannot be successful without the full participation of

both businesses and job seekers. The approaches utilized in an inclusive employment plan must form an integral part of the business and economic strategies of the local community. This requires an increased knowledge of the local, regional, state, national, and global economic factors that shape future employment opportunities. While it is impossible to predict the future, trends identified by forecasters indicate a continued expansion of the global economy (Hudson Institute, 2003). In addition, the job market will shift from producing goods to providing services and information exchange, with an increasing utilization of technology. This modifies the range of jobs available, how jobs are performed, and what skills are essential for the employee and mandatory for the employer. Coupling these economic development trends with changes in the overall workforce (age, diversity, skill levels, and gender), the interaction between workforce development and workforce participation becomes even more complex. (Ellwood, 2001)

There are clear indications that the present structure of employment/training and disability programs is not in line with an economic engagement concept. The following lists offer the reader a sense of the dynamic nature of workforce development and workforce participation interactions and how each complements the other in our evolving understanding of economic engagement.

Present Program Dilemmas

- Maintaining the supports and services in human services does not fully embrace the supply-and-demand dynamics of the economy. Our job training activities do not adequately focus on high-growth industries and the role of technology in both training and job placement.
- There is emphasis on a permanent job and closure rather than career development and job advancement.
- Human services focuses on process not outcome in, with education and training in preparation for a person's only entry into employment often the central focus, overlooking the need for career development.
- Program staff often focus on preserving public benefits in lieu of finding a job with benefits.
- An all-or-nothing perception exists regarding access to public programs or private resources, with little recognition of the considerable benefits to public and private partnerships in addressing supports that help people access and maintain employment.

Economic Engagement Challenges

- Adopt an approach with a focus on development, negotiation, and job creation with employers and job seekers
- Consider the implications of future economic development trends in the establishment of employment and training efforts for job seekers with disabilities
- Recognize that lifelong learning and flexible supports are essential if maintenance and career development are to be a reality for the employee with a disability

- Develop strategies to integrate both public and private benefits to support persons with disabilities to access and advance in employment (comprehensive benefits, flexibility in range of benefits, and portability)

Given the changing trends in both the nature of employment and the core workforce in the coming decades, redesigning the employment and training system for individuals with disabilities must integrate the concepts of economic engagement. An economic engagement concept anticipates that states will be able to answer the following questions as they move ahead on the development of a comprehensive employment system"

- Are the workforce systems at the state and local levels structured to capitalize on labor market trends?
- Can workforce participants identify the source of support for lifelong learning that will enable them to respond to needs of businesses for skilled workers?
- As employer-employee relationships become more individualized and shift from single lifetime jobs to arrangements such as distance work, shared jobs, and contracted/self-employment, how will the employment system support both workers and employers in this dynamic relationship where job task flexibility and increased expertise are counterbalanced by worker mobility and needs for variable hours and flexible wages and benefits?

ii. Workforce participation.

An inclusive employment system will support both access to employment and career planning for individuals, enabling them to access opportunities for greater self-sufficiency and economic stability.

Such a system encourages and supports growth, change, and risk-taking. Risks are seen as part of the economic growth process for the individual and are planned for and responded to rather than avoided. Supports are designed to minimize or reduce the potential for negative outcomes for the individual as well as the employer. For the individual, the right job leads to increased net worth, increased levels of satisfaction, and increased opportunities to develop additional social networks and community membership. For the employer, the right job leads to profitability, workforce responsiveness, and the ability to meet customer needs.

The goals of a comprehensive employment system must include assisting individuals to enter the workforce, continue in the workforce, and maximize economic impact and benefit as members of that workforce. Workforce participation is not measured only by the job an individual happens to hold; rather, it is defined as seeing oneself as an active member of the workforce—accessing, maintaining, and advancing in employment, and being part of the economic activity of the community. This identity is critical to both the individual and the broader community because employment is a central feature of the individual's life within a broader social context.

Employment programs therefore must also be part of the local economic growth strategy. They cannot be seen as alternatives to, or on the fringe of, community prosperity. At the present time

there are two types of programs that support individuals with disabilities: those that support workforce participation by individuals with disabilities (health and disability insurance programs, worker compensation and employee assistance programs) and those that provide services to individuals who are not workforce participants (day activity, workshops, vocational preparation programs).

An argument may be made that some of the programs in the second category (services to individuals who are not workforce participants) provide modest employment services offering a few hours a week of work. However, this level of employment activity generally limits the individual's ability to achieve economic self-sufficiency. For the general public, such services are not viewed as employment but rather human services, with the expectation of self-sufficiency modest at best.

The panel of experts continually reinforced the need for high expectations regarding employment and economic outcomes. This represents a movement away from care and protection to the expectation of participation and contribution in the workplace. The mixed messages regarding employment need to be replaced with clear employment goals and incentives that reward individuals for being workforce participants. "Disability services environment," often the setting for most persons with disabilities, can be a barrier to accessing employment because of planned and continuing dependency. As stated earlier in this report, there must be a shift in the view of workforce participation away from the perception of employment as a high-risk activity to one that recognizes and reinforces the rewards from both an economic and social perspective. Work is what fully included adults in our society do. As such, it must be available to individuals with disabilities as well. It is not an add-on but a core service of the human services and rehabilitation fields.

A strong workforce participation agenda will provide a platform upon which states can begin to shift current disability services from dependency to economic engagement. The end result will be increased economic stability through wages, benefits, and asset development for individuals with disabilities. With this as a goal, states will need to address a series of challenges.

- How can states move a large human service system away from perpetual supports to a model of transitional and/or intermittent services?
- What should the mission of the myriad human service agencies be with regard to developing a comprehensive system of employment services and supports?
- What policies need to be in place to develop a shared public and private support service for workers with disabilities?
- What are some of the ways that employees with disabilities can advance in employment, retain wages and earnings, and develop a long-term asset base for future years?
- What criteria will be used to measure success across agencies in supporting workforce participation by persons with disabilities?

- How should disability-focused employment services be integrated with the generic employment and training system?

iii. Universal design.

The questions regarding employment for persons with disabilities move from what the role of persons with disabilities should be in the workforce to what kinds of services and supports maximize labor force participation by all job seekers, including persons with disabilities. The expectations for economic engagement are now the same for all. Disability is seen as another factor that is part of the many factors (age, race, gender, etc.) that have influence and impact on workforce participants.

Similarly, the strategies that are developed to support the worker with a disability must be able to address other groups of job seekers that have difficulty accessing employment. Identifying interests and preferences, matching these to the expectations of the employer, negotiating differences when necessary between those interests and the employer's needs, and finally identifying the supports that the person will need on-site—all these are part of an inclusive strategy for supporting persons with disabilities to enter and remain in the workplace.

These same strategies should also have relevance to a wide range of workers, particularly other segments of the workforce who are not yet engaged in employment. Such groups include those exiting public supports such as welfare, new immigrants to the workforce who will need some assistance in getting through the process, and older workers who are returning to or reengaging employment and need to develop new job skills.

A comprehensive employment system recognizes that success for the individual is also success for the economy. To expect individual success that does not meet economic and workforce goals is as unacceptable as economic success that does not provide for individual financial gain. Ultimately the goal of this effort must be an employment, training, and support system that is inclusive, comprehensive, and leaves no worker behind, leading to economic gain for the individual as well as the employer.

- What are the essential features of an inclusive system that is built upon the principles of universal design?
- How do the universal design features have a positive impact on all workforce participants?
- What resources and/or strategies exist outside of human services that can be accessed to support increased workforce participation?
- How can workplace supports for individuals with disabilities be generalized to impact the total workforce, and vice versa?

iv. Flexibility.

The goal of economic success will shift programs from focusing on eligibility, program requirements, and processes to using growth and learning models that are measured by increased labor force participation by all workers.

A flexible, inclusive employment strategy must be able to respond to the needs of job seekers in a timely fashion. Resources that are immediately available and able to effectively address individual needs will go a long way in supporting person with disabilities in considering employment. For some, transportation, flexible housing, and innovative support services are essential pieces of the employment puzzle, while for others the needs for skill training and on-site supports may be more critical. In order to develop a system that can address individual needs in a timely and efficient fashion, considerable flexibility must be available in the allocation of fiscal resources and the integration of support services across all of the major life areas.

Flexibility within workforce participation incorporates adaptable supports, seamless methods of service delivery, and funding that is readily available and capable of addressing job needs on- and off-site. Our rapidly changing technical and decentralized economy is expected to result in continued expansion for portability of benefits. Thus workers will have increasing choices and options that allow them to balance their individual interests and their work goals. Workers will be able to create menus of benefits and services rather choosing from a one-size-fits-all design. The continuous development in how benefits such as insurance, financial planning and savings, family and day care, elder care, family leave, and flextime are offered by employers should serve as models of how to approach the design of flexible systems for workers with disabilities. The development of the à la carte model of benefits and workplace supports can afford a point of intersection between the public and private resources that are available to individuals with disabilities.

The individual and the system must mutually recognize the opportunities and risks of flexible approaches. Individuals must have the information and technical support in key areas so that they see the full range of possibilities, both gains and risks, about the decisions they are considering. The principle of "do no harm" was set forth by the group, but again this does not mean "take no risks" but rather "know the risks" and plan for and adjust to them.

Systems flexibility may mean a change in the way services are financed, provided, and focused. Current disability programs often rely upon a provider system that in many ways is responsive to state initiatives while simultaneously being reluctant to change. Similar to individuals, systems need to have adequate information on the risks and benefits to change and then be expected to engage in change even when there is some level of uncertainty. For some providers the system may mean a new way of financing services, a new set of outcomes to be addressed, and different expectations of the roles of consumers and new partners.

Another necessary component of flexibility is control of financial resources. The shift to worker responsibility for career and skill development, portability of benefits, and the utilization of concepts such as training accounts for incumbent workers creates within the economy approaches that support flexibility. To create a flexible system as part of the comprehensive employment system, a number of questions are apparent.

- How are funds and resources utilized to support persons with disabilities?
- What strategies are present that would allow for the integration of funds to address employment outcomes for individuals with disabilities?
- What strategies exist for changing service systems purchasing to develop a clearer focus on employment as a desired outcome?
- What combined outcome measures should be collected across agencies that will provide a picture of employment at local and state levels?
- What policies exist that inhibit career development and asset accumulation for persons with disabilities?
- What strategies need to be initiated to ensure consumer direction and control?
- Can fiscal resources move from agencies and programs to workers and employers?

v. Simplicity.

What was referred to as the "paradigm of contradictory messages" was a main theme throughout the group's discussions. The policies that require individuals to prove they cannot work in order to gain access to the resources they need to work were articulated over and over. The insidious nature of these policies and practices creates confusion. The incompatibility of missions, goals, practices, and impacts across agencies at federal and state levels is well documented and has yet to be resolved. It is small wonder that the resulting approaches to services and supports are both inconsistent and complex.

Current workforce development systems have separate strategies leading to different and frequently inconsistent outcomes. Programs that focus on security and protection, preserving Social Security benefits, continuing access to Medicaid and Medicare programs, and maintaining the reimbursement strategies that state systems now engage in with community providers typically note employment as a central goal. Yet they require services that segregate individuals from the main economic activities of the community by perpetuating low workforce participation through programs that minimize meaningful employment.

The advent of the concepts of self-determination and consumer-directed services has raised the need to consider not the current separate silo design in employment and training but rather the use of individual budgets, a focus on personal preferences and interests, and the provision of supports on a "when needed and as needed" basis. It is essential that state receive the clear message from federal funding agencies that employment is the preferred outcome for persons with disabilities. While waivers and demonstrations reinforce employment as a goal in selected

populations and for limited time periods, there is a need to fundamentally change the way states structure reimbursement so that employment becomes a goal that can be directly supported and not considered a demonstration or optional service.

At the state level there is a need to identify ways to make resources (both personnel and fiscal) available to meet immediate needs and resolve current barriers to employment. The complex ways of weaving fiscal resources together often becomes for some the end outcome rather than a process leading to an employment outcome. The goal is not to refinance or restructure funding patterns. Employment is the goal, with flexible funding a means to that end.

There has been a clear call for the creation of mechanisms to support individuals and employers. These mechanisms must offer a way to weave together the multiple resources that workers and employers need to achieve their economic goals. The issues that must be addressed to achieve successful economic engagement range from simple to complex, and the processes to resolve them are the same. The focus is not on what the system needs but what the individual and the employer need. Rather than the individual fitting into a system, the system should be modified as necessary.

There is a clear understanding that information and potential approaches will always increase. Simplicity means that accessing and using knowledge should be easier.

- Is there a consistency of message that workforce participation is the goal across all agencies: public, not-for-profit, and for-profit?
- Do individuals have access to people who can guide them as they develop supports not on a one-time basis but on an as-needed basis?
- Is it easy for individuals and businesses to create the funding arrangements to achieve successful workforce participation?
- Are the methods for arranging and funding supports easily understood by both employees and employers?
- Do workers and employers have access to clear information?

vi. Individualization.

It is fundamental that the interests and needs of each person be incorporated through person-centered planning or a similar customized planning design. The population of persons with disabilities is heterogeneous, with diverse skills, interests, and preferences. The development of any employment plan must reflect the unique skills and interests of the individual with disabilities. In addition, it is essential that an inclusive employment system have the capacity to develop employment access and support plans that address the needs of the employer as well as the applicant.

Customizing the relationship between the interests and preferences of the individual and the needs of the business will enhance the possibilities of a successful job match—one that meets the

expectations of both the employer and the employee. Historic approaches that sought to place a job seeker with a disability into an available job have often led to an employer-employee relationship that does not last. It is crucial to individualize the job matching/job search/job supports process.

The changes in both the nature and design of the workplace will require that workforce participants and employers continue to be creative in negotiating and molding the employee/employer pact. Employers' very success is built on their ability to rapidly modify the work environment to maximize business opportunities. The utilization of existing employer human capital maximizes the capacity of the business to increase productivity and thereby profitability.

A concern raised in the expert panel discussions was that many experiences with person-centered planning, individual budgets, and choice have focused on community living and day activity needs, not employment. There is a critical need for a consumer-directed and individually designed employment plan to serve as the base for accessing employment. Equally important is the need to have employers look creatively at their current work setting to consider more flexible work schedules and supports. The matching of individual employment preferences to job expectations will be facilitated if there is the option not to fit the individual into the position but to negotiate the fit between the two parties. Full implementation of the economic engagement concept requires flexibility on the part of both the employer and the employee.

Such an individually negotiated relationship will address both workforce development needs and workforce participation interests. This individual approach, when viewed systemically, requires answers to the following questions.

- What strategies exist that will support individualized planning across multiple agencies?
- Are individual employer needs understood and reflected in the development of the employee/employer relationship?
- Are approaches to job development based upon a negotiation process that results in meeting both worker and employers needs?
- Do the initial job development processes create a platform for future adaptation of the employment relationship and career development?
- What approaches result in career planning that is strength-based and growth-oriented?

vii. Innovation.

Establishing comprehensive employment systems will require new and more varied ways of integrating resources. Doing business as usual will not meet the unique interests and needs of the job seeker as well as the business needs of the employer. The challenge of integrating resources is one that has often led to concerns about control, turf, authority, and accountability across state

and local agencies. Resource mapping, where agencies and staff are involved in identifying individual consumer needs and assigning specific personnel and/or services to address those needs, is one approach to address greater service integration.

Creating a common budget can be a challenge for programs given their actual and/or perceived mandates, regulations, and statutory responsibilities. The concerns are complicated by the perception of loss of control when budget resources are "given away." In some instances the advantage of a common budget may be achieved by "blending" funds. Such a strategy must address the concerns of agencies about the real and/or perceived loss of fiscal control.

The limits of existing programs and services are evident whenever there are discussions of real economic success for persons with disabilities. There is a strong sense that there are economic opportunities that are not being explored and developed because of the way the present programs and services are structured. The movement to individual budgets, resources that follow the person, and combining individual, private, and public funds are all emerging strategies designed to bypass some of the administrative limitations of current funding streams. Demonstrations and pilots are effective ways to test out new concepts. The challenge remains how to move promising practices into the existing and ongoing systems of services—to get innovations into operations.

It is interesting to begin to see that the innovators in the human service world are looking to the approaches utilized in business. A fundamental fact of the economic environment is that products and services have a much shorter lifespan before better products and services appear on the market. Human services still operate in the paradigm that has existed for many years, with limited ability to incorporate new innovations. There is a growing concern that, as in the case of model demonstrations, evidence-based results are not moving into the mainstream systems. As our economy changes, so must our practices. The concept of economic engagement requires an effective research/development design where innovations influence workforce development and workforce participation activities in a timely fashion.

The sustainability of proven techniques and approaches is a major topic among grant funders and other groups that seek to develop new workforce strategies. To translate models and innovative strategies into practice, the system must address some of the following questions:

- Is innovation encouraged on a systemic level, resulting in increased workforce participation and enhanced workforce development?
- Do services and supports address changes in employment opportunities for individuals with disabilities?
- Are resources directly available to workers and businesses such that they can adjust to support innovation and new ways of doing business?
- Are the approaches to allocating and combining resources flexible? Do they allow for individual, private, and public resources to be blended in innovative ways?

viii. Leadership.

A central element to any systemic change effort is strong leadership that has clear focus and strategy. Leadership at all levels is necessary if systemic change is to be effective. At the top level there needs to be a clear message that employment in a typical work setting with commensurate wages and related benefits is the goal for persons with disabilities. Developing a clear message will enable middle managers to support other staff in forming new partnerships and support their efforts to establish new ways of doing business. Studies have documented that the location of a state agency in a system matters less than the strength of the agency's leadership team to guide the agency along a path that results in increased employment for persons with disabilities (Sullivan, Gilmore, & Foley, 2004).

The panel of experts noted that workforce participation and workforce development as defined by the larger business community have different goals than programs serving persons with disabilities. The need for consistent and committed leadership supporting employment as a primary expectation for persons with disabilities is apparent. There is a need to identify, sponsor, and support leadership at all levels (local, regional, state, and national) that is embracing and using the concept of economic engagement.

Furthermore, the need to have employees and employers as key leaders is a fundamental feature of an economic engagement approach. The current approaches utilized in employment programs for persons with disabilities see the employees and employers as parties to be acted upon rather than as the leaders of change and economic development. A true partnership between job seekers, employers, and providers will foster new leadership development among all stakeholders. Through such a partnership effort, shared leadership teams are more likely to emerge.

The central leadership role of business in the governance structures under WIA has begun to shift the locus of leadership. The self-determination and consumer-directed approaches utilized in some disability and independent living programs offer examples of leadership. The challenge for an economic engagement approach is to expand these leadership practices into a coordinated approach when designing, developing, and implementing comprehensive state systems.

- What leadership approaches place employers and employees as the center of the process?
- Are there opportunities to identify and develop leadership at all levels (local, regional, and state)?
- What strategies are in place to develop leadership among persons with disabilities?
- How is leadership development in the public sector supported?

ix. Combining resources (public, private and individual).

The process of systemic change is not the sole responsibility of the public system. Employers as well as employees are also key players in any efforts to combine resources and design a new way of providing specific services and supports. Private/public, private/private, and public/public

partnerships all offer potential for modifying how services are structured. A comprehensive employment system clearly needs investment from the worker who has a disability, the employer, and the service provider.

A recent survey asked business leaders the question of who was responsible for helping to achieve increased employment among persons with disabilities. The large majority of the business leaders responded that the responsibility was shared equally by the individual, business, and government. These results show that partnership is needed to achieve the goals of workforce participation and workforce development. Recent innovations in programs, Medicaid Buy-Ins, and Individual Development Accounts provide mechanisms to move towards approaches that both combine resources and adjust to changes.

The ability to combine resources within and between agencies is essential if flexibility, individualization, and innovation of employment supports are to be achieved. Rather than just aligning resources in a set array, the ability to experiment and create new workforce arrangements will be a central component for effective economic engagement.

As has been discussed under the topic of flexibility, new types of benefits and supports will continue to emerge. In addition, the more government resources can be combined with individuals and businesses, the faster and more creative workforce participation will develop. Experimentation involving individual budgets, self-directed services, and asset development has taken place on only a very limited scale. There seems to be a reticence on the part of public programs to advocate for wider applications of these approaches. While the private sector is more aggressive in implementing approaches to flexibility, the public sector is more reluctant to embrace change because risk is often involved. The answers to some of the questions noted below may facilitate discussions about combining resources at a state level.

- What are the methods of combining individual, private, and public resources to obtain employment results?
- What adjustments in resource allocation are needed to be able to respond to the changing workforce and economic relationships that would result in increased employment for person with disabilities?
- What are the ways that the expectation for shared responsibility among workers, employers, and government is reflected in the approaches utilized to combine resources?
- What is the benefit to combining resources across agencies?

x. Technology.

Increased technological change will continue to be a major driving force in the global economy. The impact of technology in communication, information exchange, and service delivery is said by many to still be at the initial stages of evolution. Technology will also affect the amount and types of jobs as well as how and where they will be performed. It is clear that there will be an

ever-increasing reliance on technology when creating new jobs, eliminating others, and changing almost all employment situations.

Technology can form the bridge that will connect individual interests and capacities to employer needs. Technology will play a core role as a mediator in the negotiation between worker and employer by providing options for workplace arrangements. There will be instances where the worker will bring knowledge about how to apply technology, or even create or bring the technology to the employer. In some instances technology will be involved in restructuring a work setting, modifying task sequences, or creating new jobs.

In some instances, sophisticated technologies employed to ensure that an individual with a disability can complete a job task may have direct application to a business function. Voice-activated technology is one such example. One of the major issues with technology utilization is what has been referred to as cultural lag. This is a situation where the norms and expectations around certain functions or roles do not change rapidly enough to respond to the options created by technology. At times this is reflected by the fact that roles for persons are defined by what *was* available, not what *is* available. Cultural lag may be a significant issue for disability programs and services that find the approaches they use for employment preparation and support are out of step when considering the potential opportunities through technology.

The human services industry is one sector that has limited the focus on the utilization of technology to improve productivity, profits, and services. While many service industries in the for-profit sectors of the economy have looked to utilize technology on a broad basis to offer increased flexibility and choice to customers, the human service sector has lagged behind. In banking, finance, and retail, for example, the customer can handle many if not all needs directly by utilizing technology, making them a more integrated part of the service delivery process.

Technology not only increases access to information and options, but it can also be structured in ways that support workers' strengths while compensating for limitations. When considering the role of technology, there are a series of questions to consider.

- Is technology used to maximize the ability of workers to impact their job development and growth options?
- Do services and supports use technology so that the worker can directly control his or her supports?
- Is the exposure to and incorporation of technology a central feature of the workforce development and workforce participation services?
- Have the broader applications of technology been considered for a wide range of individuals seeking to become workforce participants?

xi. Outcome-driven.

As part of a comprehensive employment system, states will need to be able to answer the questions "where are we going" and "are we there yet." In order to answer these questions, there has to be clarity of direction, workforce development and workforce participation, and a clear understanding of what these terms mean both from systems and individual perspectives.

A fundamental outcome measure has to be the ability of workers to meet the demands of employers. Workers' capacity to fulfill the critical needs within a business advances the growth and stability of the economy. The success measures for individuals with disabilities must be the same as for all members of the workforce: earnings, assets, benefits, and economic self-sufficiency.

Thus it is essential that the outcome measures be directly linked to the central purpose of economic engagement, workforce participation, and workforce development. Measures of self-sufficiency, asset development, career growth, satisfaction, employment rates, performance, responsiveness to business needs, and allocation of resources (fiscal and personnel) will all provide documentation of program activities and offer a platform upon which program effectiveness can be measured.

The panel of experts felt that while many of the principles expressed here are part of the rhetoric of the current human service system, the actual collection of these data by such agencies is not viewed as essential. Emphasis on eligibility, supports received, benefits accessed, and services provided tend to be the basis of data collection for many agencies. If the true focus is on employment, then systems will need to address the following questions.

- Do the outcomes identified directly relate to workforce participation and workforce development?
- Are the outcomes essential for workers and employers?
- Are the methods of measuring and analyzing these outcomes priorities?
- Are the variables relating to employment integrated with the state quality assurance and certification processes?
- Is this system integrated into other program evaluation and quality assurance systems?
- Is this system linked to the existing labor market systems?

xii. Incentives.

A critical question in any systems change effort is what reinforcements can be used to encourage adoption of a promising practice. In other words, what events, activities, or practices will reinforce individuals with disabilities, employers, support professionals, state agencies, and the general public about the gains entailed when a person with a disability enters and remains in

employment? Any effort to change a system must be able to identify the "win-win" elements of systemic change. Stakeholders must benefit from the new way of doing business.

Incentives for persons with disabilities can be increased social opportunities, additional income, enhanced personal satisfaction, and greater economic self-sufficiency. Benefits for the agency are a reduction in costs as well as an opportunity to more effectively use limited resources, thereby serving more persons with disabilities. For the employer, the gain is filling a position, increasing profitability, and being able to respond more effectively to customer needs and demands. For the general public, the incentives are reduced use of public resources, increased economic growth, and greater ability to provide services in a cost-effective and -efficient fashion.

The incentives for all parties involved in the economic engagement effort must flow from their collective economic actions. There has often been a sense that too much focus on economic outcomes and financial success could somehow be risky for individuals with disabilities. Given the devastating effects of poverty and lack of control of assets, limited focus on economic success may be *more* risky.

Incentives must make sense within the economic structure. Concepts of career growth as well as job advancement for persons with disabilities are essential. Thus a system that "closes cases" may not address the needs of the individuals with disabilities. The incentives should provide the necessary supports to facilitate growth in job duties, financial rewards, social networks, and personal satisfaction. A full array of incentives may be realized as states address the answers to the following questions.

- Do incentives support the key economic results that workers and employers seek?
- What incentives are needed to ensure positive changes for workforce participants?
- What incentives make it easier to support job growth and workforce development?
- What incentives are available for employers to hire and promote job seekers with disabilities?
- What interaction should exist between employers and the human service system to address incentive creation?
- What are the incentives for change in the way human service systems operate?

III. Summary of Lessons Learned in Comprehensive Employment Options

This report has attempted to outline some of the views of the panel of experts regarding employment of persons with disabilities. The evolution of perception and practices, the findings of evidence-based practices, emerging economic trends, and the changing workforce have all served to shape the need for an inclusive employment systemic change effort. Under CMS leadership the call to action has again been made, and the focus on linking workforce development with workforce participation under an overarching concept of economic

engagement is being put forth through this report. Individual preferences, interest in greater control and self-determination, and the recognition that persons with disabilities can and should work are no longer revolutionary concepts. What has been absent is the linking of workforce development with workforce participation with disability services. The concept of economic engagement recognizes that all elements of the workforce must be given the opportunity to seek jobs, find jobs, advance in employment, and remain employed over time. It is a concept that interweaves the needs of business with the interests of the job seeker who has a disability. It is also a concept that calls for changes in how human services relates to business if, in fact, employment is to be a central focus.

This report has described the need for systemic change based upon a series of emerging business and human service themes. It is not the intent of the report to prescribe specific steps in designing an inclusive employment strategy. Rather the intent is to outline some key principles and themes that must be considered if a state and its local delivery system is to encourage individuals with disabilities to consider employment and employers to consider persons with disabilities as potential workers. Many resources exist at the federal, state, and local levels that can be woven together to form the platform upon which a state can construct an inclusive employment opportunities strategy. This report puts forth the concept of economic engagement and attempts to link the needs of business (workforce development) with those of the individual job seeker (workforce participation).

Success creating and implementing such an employment system must blend the needs of all key stakeholders with the realities of the economic environment within which we work. Leadership, innovation, risk-taking, and change are all elements that will support a new way of doing business for employers, persons with disabilities, and providers of services and supports in the coming decade. Creating an inclusive employment strategy requires collaboration, coordination, and a concerted effort by many over an extended period of time.

Appendix A: List of Participants

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Appendix B: Agenda

ICI/CMS Employment Meeting
February 9-10, 2004

BWI Airport Marriott
1743 West Nursery Rd.
Baltimore, MD 21240
410-859-8300
410-691-4555 (fax)

This meeting will be an expert panel on what a statewide comprehensive system of employment for individuals with disabilities would look like.

We will initially approach this task from the point of view of the consumer.

What would persons with disabilities want and need in a comprehensive employment system that would enable them to achieve, maintain, and expand their economic earnings and assets?

What would the consumer desire in terms of:

- Services
- Ways of arranging and accessing services
- Access to information and resources
- Support options
- Outcomes
- Methods of financing services
- Types of technical support and advice

The experiences and perspectives on systems change, employment, and economic issues facing individuals with disabilities or other populations, as well as the ability to look at the larger systems, are the primary reasons we have asked you to participate in this meeting.

The creative and critical thinking that you bring is the key ingredient for the meeting.

We hope that you will find the opportunity interesting and stimulating.

Attached is some background information regarding Medicaid. This is just for your general knowledge—we will not be using this information during our meeting.

Monday, February 9

12 noon - 12:30

Introductions and Overview of the Meeting
Working Lunch

1:00 - 2:30

Design the Comprehensive Employment System

2:30 - 2:45

Break

2:45 - 4:30

Design the Comprehensive Employment System

4:30 - 5:00

Review of Progress/Issues for Tuesday

5:30 - 6:30

Dinner

Tuesday, February 10

8:30 - 9:00

Breakfast

9:00 - 10:15

Issues in the Implementation of the Comprehensive Employment System

10:15 - 10:30

Break

10:30 - 12:00

Summary and Wrap-up

12:00

Box Lunch

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