LEAD Center Hosts First Annual Policy Roundtable to Improve Employment and Economic Status of Individuals with Disabilities

On July 17 and 18, 2013, the National Center on Leadership for the Employment and Economic Advancement of People with Disabilities (LEAD Center) hosted its first annual Policy Roundtable in Washington, D.C., that brought together federal agency leaders, state and local agency policymakers and practitioners and subject matter experts on cross-system collaboration.

The purpose of the roundtable was to build a progressive vision that promotes the effective leveraging of resources to improve employment and socioeconomic advancement of youth and adults with disabilities. The current federal approach is fragmented by individual agencies directed to work under distinctive policies and regulations, each critical to the support of individuals with disabilities but few coordinated across systems. Each system has a specific set of rules to determine eligibility for services and support, define scope of services and allocate resources. No single source or resource is able to respond effectively to the diverse needs of
each individual with a disability, who often faces multiple barriers to employment. Coordination across systems is critical, but is seldom required through policy.

In the last decade, the federal government has sponsored numerous efforts to improve coordination of public funding across service delivery systems. Two concepts, “blending” and “braiding,” have been designed to use resources in more coordinated and flexible ways.

**Blended funding** occurs when dollars from multiple funding streams are combined to create a single “pot” of dollars that is then used to purchase one or more specific services that support an individual with a complex employment situation in pursuing, obtaining or maintaining integrated employment.

**Braided funding** occurs when multiple funding streams separately and simultaneously purchase and provide specific services that support an individual with a complex employment situation in pursuing, obtaining or maintaining integrated employment.

The U.S. Department of Labor’s Office of Disability Employment Policy (ODEP) and the LEAD Center set three objectives for the first annual Policy Roundtable:

- Increase understanding of effective strategies for cross-system collaboration and blending and/or braiding resources;
- Identify policy and practice options with government at all levels to overcome barriers to the blending and/or braiding of resources;
- Develop recommendations for government to increase scalability of effective practices and accelerate individual and systems change.

Participants joined in a presentation and discussion of the roundtable background paper, which identified challenges from multiple case studies and common elements of success with blending and/or braiding public resources. Participants also broke into small workgroups to develop policy recommendations and built roadmaps to take successful models of blending/braiding to scale.

Second-day opening remarks were delivered by Assistant Secretary of ODEP Kathy Martinez followed by roundtable participants meeting with a federal agency reactor panel with leaders from the U.S. Department of Labor’s Employment & Training Administration, the Administration on Intellectual and Developmental Disabilities, the Centers for Medicare and Medicaid Services and the U.S. Department of Education’s Office on Special Education and Rehabilitative Services to highlight discussions and policy recommendations. The event closed with a presentation from LEAD Center Policy Team Co-Chair and National Disability Institute Executive Director Michael Morris.

**Challenges Identified**

The myriad of disability-focused programs funded primarily by the federal government currently has no centralized consensus-based strategy to support individuals with disabilities to become economically self-sufficient.

Few federal programs reward cross-system efforts or evaluate performance based on an
integrated service delivery model. The examination of rules and guidance from multiple federal agencies, such as the Rehabilitation Services Administration (RSA), Office of Special Education Programs (OSEP), Centers for Medicare and Medicaid Services (CMS) and the Employment and Training Administration (ETA), reveal restrictions as “payer of last resort” that is inconsistent with a resource coordination and cost-sharing approach that is needed.

Call to Action

Assistant Secretary for ODEP Kathy Martinez pledged to utilize the recommendations from the first annual LEAD Center Policy Roundtable to engage other federal agencies in a coordinated effort to improve integrated employment outcomes and economic advancement of youth and adults with disabilities.

The LEAD Center will work collaboratively with Assistant Secretary Martinez and ODEP staff to develop specific requests for next-step activities to be negotiated between ODEP and other federal agencies that implement roundtable recommendations. A report summarizing the roundtable discussions with recommendations will be issued by the LEAD Center shortly. For more information on the Policy Roundtable, discussions and individual and organizational participants, please read the LEAD Center Policy Roundtable executive summary and additional materials on to the LEAD Center website.

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Section 503 and VEVVRA Rule Changes to Advance Employment Outcomes and Economic Opportunity for People with Disabilities, Veterans

The U.S. Department of Labor announced last month two final rules to improve hiring and employment outcomes for veterans and people with disabilities. The rules update regulations for Section 503 of the Rehabilitation Act of 1973 and the Vietnam Era Veterans’ Readjustment Assistance Act of 1974. Both rules go into effect in March 2014, and will strengthen civil rights laws to create more economic opportunity for both veterans and people with disabilities. For more than 40 years, these laws have required federal contractors and subcontractors to affirmatively recruit, hire, train and promote qualified veterans and people with disabilities.

The Section 503 rule update introduces new hiring goals for people with disabilities for federal contractors and subcontractors. The new rule states a goal of 7 percent of each job group in a federal contractor’s or subcontractor’s workforce should consist of qualified individuals with disabilities. The rule also outlines specific actions contractors must take regarding recruitment, training, record keeping and policy dissemination practices that echo long-standing workplace equality requirements for women and minorities.

To comply with the VEVRAA rule update, federal contractors must establish a quantifiable metric to measure their success in recruiting and employing veterans. Contractors need to adopt an annual benchmark that is based on either the national percentage of veterans in the workforce (currently 8 percent), or their own benchmark based on the best available data. Accountability
and record-keeping requirements are fortified by the rule update, as are clarifications around job listings and subcontract requirements. These improvements allow contractors to measure effectively their recruitment and compliance efforts.

The Office of Federal Contract Compliance Programs (OFCCP) is responsible for enforcing Section 503 and VEVRAA as well as Executive Order 11246. These three laws require federal government contractors and subcontractors to follow the fair and reasonable standard that they not discriminate in employment on the basis of sex, race, color, religion, national origin, disability or status as a protected veteran.

For more information on the Section 503 and VEVRAA rules, visit www.dol.gov/ofccp/503Rule and www.dol.gov/ofccp/VEVRAARule. You can also call OFCCP’s toll-free helpline at 800-397-6251 or visit http://www.dol.gov/ofccp.

The LEAD Center will continue to bring you news, information, webinar and training opportunities about Section 503 and VEVRAA and continue to work with the U.S. Department of Labor and the Office of Disability Employment Policy (ODEP) on leveraging these rules to advance employment and economic self-sufficiency outcomes for people with disabilities.

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New Congressional Bills Champion Economic Self-Sufficiency for Low-Income Populations

With the latest U.S. Census data showing the number of Americans living in poverty on the rise and asset inequality growing, a number of new bills introduced on Capitol Hill seek to champion economic self-sufficiency for low- and moderate-income individuals and families. Legislative proposals currently under consideration in the House and Senate seek to expand availability of Volunteer Income Tax Assistance (VITA), modify eligibility and the amount of the Earned Income Tax Credit (EITC) and establish a matched savings option as a new tax benefit. These bills would help the nearly 1 in 3 people with disabilities living in poverty, among the highest poverty rate of any underserved population in America.

The Volunteer Income Tax Assistance Act (S. 1368), introduced on July 25, 2013, by Senators Sherrod Brown (D-Ohio), Tom Udall (D-NM), Jay Rockefeller (D-WV), and Bob Menendez (D-NJ), seeks to expand funding to $30 million annually for the VITA grant program to provide matching funds to develop and expand qualified tax-return preparation programs assisting low-income tax payers and members of underserved populations, including people with disabilities. The grants would be awarded on a competitive basis and must demonstrate low-income taxpayer outreach and education around available income supports and refundable credits such as the Earned Income Tax Credit (EITC), a federal tax credit for low- and moderate-income workers that helps reduce poverty by supplementing earnings. The VITA Act would also establish a National Center to Promote Quality, Excellence and Evaluation in Volunteer Income Tax Assistance. The Center would support outreach and training to replicate best practices from VITA sites and expand
marketing efforts nationwide to raise awareness and encourage use of VITA as a free service among low- to moderate-income populations, with special attention to underserved populations including individuals with disabilities. During 2012, VITA programs filed 1.6 federal income tax returns and helped low-income taxpayers claim $2.2 billion in tax refunds. However, one in five taxpayers who were eligible to claim the EITC failed to do so.

The Working Families Tax Relief Act (S. 836), introduced on April 25, 2013, by Senator Sherrod Brown (D-Ohio) and cosponsored by 29 other Senators, seeks to expand coverage of the Earned Income Tax Credit. A companion House Bill (H.R. 2116) was introduced by Representative Richard Neal (D-MA) and cosponsored by 40 other House members. Both bills would expand coverage of EITC to low-income individuals without qualifying children who are at least 21 years old and not full-time students. Current law limits eligibility for EITC to individuals 25 years old and older. The legislation would also expand the amount of the refund for eligible individuals and families.

On August 1, 2013, Representative José Serrano (D-NY) introduced the Financial Security Credit Act of 2013 (H.R. 2917) to offer low- and moderate-income earners new incentives to save at tax time. The bill provides eligible individuals and families an opportunity to save their tax refunds by making deposits into any of a number of savings options. An individual or family will be eligible for a refundable tax credit of up to $500 if the savings is maintained for eight months, with the credit being deposited directly into their account. Qualified savings accounts would include 529 college-savings accounts, qualified retirement accounts such as 401(k) and IRAs, as well as certificates of deposit and savings bonds. The proposal builds on the successful SaveUSA program model, which was initiated in New York City and has been replicated in other cities nationwide. The match offered is a further incentive to low-income individuals and families to focus on longer-term economic stability and security.

The LEAD Center and National Disability Institute urge the disability community to become informed about these proposals and be a part of the tax reform debate.

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**LEAD Center Presents at NCIL Annual Conference**
The LEAD Center showcased one of its pilot demonstration projects to advance employment and economic self-sufficiency outcomes for people with disabilities during a panel presentation on July 27 at the 2013 National Council on Independent Living (NCIL) Annual Conference in Washington, D.C. The LEAD Center’s pilot project, designed to increase collaboration between Centers for Independent Living (CILs) and local American Job Centers (AJCs), consists of five CILs located across the United States in both urban and rural areas. Each CIL works with 10 job seekers with disabilities in its community to access the services and supports available through the public workforce system by visiting its local AJC.

Karen McCulloh, LEAD Center Project Director, and Alexandra Kielty, LEAD Center Demonstration and Innovations Team Leader, co-moderated the panel with representatives from three of the CILs participating in the pilot project: Dan Kessler, Disability Rights and Resources in Birmingham, Ala.; Sheri Burns, Community Resources for Independent Living in Hayward, Calif.; and Tami Hoar, Montana Independent Living Project in Helena, Mont. The other two CILs participating in the project include IndependenceFirst in Milwaukee, Wisc. and Paraquad in St. Louis, Mo.

The presentation focused on the goals and objectives of the CIL demonstration for improving AJC service delivery to jobseekers with disabilities, including impacting public policy by involving CILs in the public workforce system, developing promising best practices to produce a replicable model for other CILs, improving employment outcomes, and expanding CIL impact and expertise to create system change.

Panel members addressed systemic employment and work incentive barriers impacting employment opportunities of people with disabilities. CIL panelists agreed that involvement in the LEAD Center pilot project has helped their organizations further develop partnerships with local AJCs to leverage services and expertise to advance employment outcomes for people with disabilities in the local community. As part of the pilot project, CILs are providing disability awareness training to local AJCs and supporting their local AJC with onsite or telephone assistance as needed.

The LEAD Center is creating a CIL Toolkit to help CILs assist jobseekers with disabilities in partnership with their local AJCs. The toolkit includes: 1) a CIL checklist to prepare job seekers before they visit AJCs, 2) an AJC guide discussing the Workforce Investment Act and various services typically provided by AJCs, 3) a disability awareness and etiquette guide for CILs to provide training to AJC staff and 4) an acronym/glossary guide of terms used in the public workforce system.

NCIL reported positive feedback from its members attending the LEAD Center CIL panel presentation. Audience participants shared that the information provided was a new concept for CILs to create collaborative partnerships with American Job Centers to advance employment opportunities for job seekers with disabilities.

The LEAD Center’s monthly webinar series targeted to workforce development professionals, policy makers, employers and individuals with disabilities and other LEAD Center stakeholders offers participants the opportunity to interface with national thought leaders and subject matter experts about important issues affecting the disability community. LEAD Center webinars provide knowledge translation of ODEP-identified best practices to improve the capacity of American Job Centers (AJCs) to serve job seekers with disabilities and to improve the employment and economic advancement outcomes of people with disabilities.

In its inaugural year, the LEAD Center conducted webinars in three mini-series–Promoting Economic Advancement, Promoting Employment and Promoting Leadership through Public Policy. Nearly 2,700 individuals have attended webinars this year. Of the hundreds of participants providing feedback, 95 percent said the webinars are useful and 92 percent reported the information they received was clear and that they have a better understanding of the topic.

Kicking off with an inaugural webinar in January 2013 introducing the LEAD Center, the nine-part series covered a variety of topics, including:

**Promoting Economic Advancement mini-series:**
- February 2013 - Implementing Free Tax Preparation Services
- March 2013 - Implementing Financial Education Opportunities
- April 2013 - Using Work Incentives to Build Financial Stability

**Promoting Employment mini-series:**
- May 2013 - Introduction to Customized Employment and Customized Self Employment
- June 2013 - Group Discovery: An Alternative Assessment Tool for Workforce Centers and Community-Based Providers
- July 2013 - Discovering Your Potential: Using Discovery to Identify Your Employment Goals

**Promoting Leadership (Public Policy) mini-series:**
- August 2013 - Cross-Agency Approaches to Advance the Use of Customized Employment and Self-Employment Strategies for Individuals with Disabilities
- September 2013 - Effective Strategies for Integrating Employment Outcomes and Services into Managed Care Models

If you missed a webinar, want to revisit a topic or if you need training materials, the LEAD Center website provides an easy-to-access webinar archive which includes captioned presentations, PowerPoints, transcripts and answers to questions asked after the webinar or
during the webinar’s question-and-answer session. Visit the LEAD Center webinar archive at www.leadcenter.org/webinar-archive to access any webinar in the series at your convenience. Stay tuned to www.leadcenter.org or the LEAD Center’s social media sites for announcements regarding the upcoming 2013-2014 series.

Guest Blogs Bring Expert Perspective on LEAD Center's Core Areas

Want to learn about the latest innovative practices regarding policy, employment and economic advancement for people with disabilities? Interested in getting a new perspective on these issues? The LEAD Center’s blog, launched in June, has featured guest blogs from Assistant Secretary Kathy Martinez of the U.S. Department of Labor’s Office of Disability Employment Policy (ODEP), Jonathan Mintz, Commissioner of the New York City Department of Consumer Affairs and Founder and Co-Chair of the Cities for Financial Empowerment (CFE). The LEAD Center’s latest guest blog about customized employment and developing job opportunities up the supply chain was authored by guest blogger Cary Griffin of Griffin-Hammis Associates, a national expert on innovative employment solutions for people with disabilities. The LEAD Center blog also includes an “In The Know” feature, connecting people with key resources on policy, employment and economic advancement for people with disabilities. Interested in being considered as a LEAD Center guest blogger? Visit the LEAD Center blog to submit your request and join the conversation through a post or by adding a comment.

LEAD PEOPLE Michael Morris, Executive Director, National Disability Institute, LEAD Center Policy Team Co-Lead

Michael Morris is the LEAD Center Public Policy Team Co-Lead and the Executive Director of National Disability Institute (NDI) in Washington, D.C. Morris has more than 35 years of experience inside and outside of government pioneering new strategies to improve the lives of people with disabilities. Morris serves as an advisor and technical expert to multiple federal agencies on policy and systems’ relationships at federal, state and local levels to advance economic stability, mobility and asset development for persons with disabilities.

Morris received his undergraduate degree with honors in political science from Case Western University in Cleveland, Ohio, and his law degree from Emory University School of Law in Atlanta, Ga. In 1981, he was named the first Joseph P. Kennedy Fellow in Public Policy and came to Washington, D.C. to work in the Office of Connecticut Senator Lowell Weicker, as legal counsel to the United States Senate Subcommittee on Disability Policy. Morris also served subsequently as counsel to the U.S. Senate Small Business Committee.

From Capitol Hill, Morris went to work at United Cerebral Palsy Associations first as Director of Government Relations, then as Director of Community Services, and finally as National
Executive Director. During his 14-year tenure, his leadership put a focus on needed assistive technology and its essential role in accommodating people with disabilities in the areas of employment, education, communications and daily living.

In 1998, Morris was project director and PI of the NIDRR-funded RRTC on Workforce Investment and Employment Policy at the Law, Health Policy & Disability Center (LHPDC) at the Iowa College of Law. He analyzed federal-state relationships in multiple systems, identifying barriers of asset limits to income production and self-sufficiency. In 2003, Morris became project director for the NIDRR-funded Asset Accumulation and Tax Policy Project, and for eight years served as lead policy expert on systems collaboration, informing research design and implementation.

In 2001, Morris helped establish National Disability Institute (NDI) as the first national nonprofit dedicated exclusively to advancing the social and economic independence of persons with disabilities through strategic investment and technical assistance activities nationwide that bring together government, corporations, foundations, and community and faith-based organizations. With NDI, Morris co-founded the Real Economic Impact Tour (REI Tour) in 2005 which evolved into the Real Economic Impact Network (REI Network), a national movement resulting in new access and use of EITC and other asset-building strategies for more than 1.5 million individuals with disabilities in 100 communities nationwide and helped low-income taxpayers with disabilities receive more than $1.4 billion in tax refunds.


LEAD PARTNERS Community Transportation Association of America (CTAA)

The Community Transportation Association of America (CTAA) is a national association of organizations and individuals committed to removing barriers to isolation and to improving mobility for all people. CTAA formed as an organization back in the late 1980s when two national associations—the National Association for Transportation Alternatives and Rural America—combined to become CTAA. Since that time, the organization’s board, members and
staff have played a variety of roles in federal/national, state and local arenas to raise the importance of mobility in ensuring health and wellness, economic self-sufficiency and community in our nation. CTAA is a Knowledge Transfer Consortium partner of the LEAD Center. The LEAD Center Knowledge Transfer Consortium partners share information about the LEAD Center and its work with their networks.

CTAA is a national membership organization, has a professional development and training arm and also staffs several national technical assistance programs all geared to support transportation capacity building in local communities. Some highlights of CTAA’s work include:

1. CTAA co-leads the new **National Center for Mobility Management**, in partnership with Easter Seals and the American Public Transportation Association. The goal of the center is to facilitate communities in adopting transportation strategies, such as mobility management, one-call/one-click transportation services and coordinated service delivery. The Center works with transportation, human services, workforce development, education and other arenas to build partnerships to improve mobility options for persons with disabilities, older adults, low-wage residents, veterans and other residents. For information, visit the Center’s website at [www.NationalMobilityManagementCenter.org](http://www.NationalMobilityManagementCenter.org), which will go live in October.

2. CTAA has joined with National Association of Area Agencies on Aging, Easter Seals and Westat to implement the U.S. Department of Health and Human Services’ Administration for Community Living’s (ACL) **Strengthening Inclusive Coordinated Transportation Partnerships to Promote Community Living**. The mission of this project is to demonstrate the value that inclusive processes can bring to transportation efforts. Currently 17 communities are developing, testing and demonstrating ways to empower people with disabilities and older adults to be actively involved in designing and implementing coordinated transportation systems. For more information, visit [www.transitplanning4all.org](http://www.transitplanning4all.org).

3. As part of its U.S. Department of Agriculture-funded rural and tribal technical assistance programs, CTAA provides short- and long-term support to tribal and rural communities to enhance economic growth and development by improving transportation services. These programs are a great opportunity for community organizations to expand transportation to advance employment for adults with disabilities. For more information, visit [www.ctaa.org](http://www.ctaa.org).

CTAA’s vision of America’s public and community transportation future—the cause it serves—is based upon fundamental values that are as old as the nation itself. Freedom, independence, dignity and choice are as much at the heart of the debate for building an accessible society as they have been in building a free society. There is never an end to the work to create a free society, and there will never be an end to CTAA’s work to build a more mobile society. Both of these noble pursuits remain great works in progress.

For more information about CTAA, visit their website at [www.ctaa.org](http://www.ctaa.org).

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