



LEAD CENTER

Employment First Technical Brief #3:
Criteria for Performance Excellence in *Employment First*
State Systems Change & Provider Transformation

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Employment First Technical Brief #3

Criteria for Performance Excellence in *Employment First* State Systems Change & Provider Transformation

In recent years, state governments have launched a variety of systems-change efforts aimed at improving competitive, integrated employment outcomes of youth and adults with significant disabilities. These efforts necessitate a common baseline of expectation, quality standards, and anticipated milestones for establishing a consistent approach for measuring success of such efforts and assuring their continuity and sustainability over time.¹ A number of effective practices have been developed, tested, and validated over the years that lead to competitive, integrated employment for individuals with the most significant disabilities, including competitive demand positions, customized employment relationships and strategies, individualized supported employment services, and self-employment or entrepreneurship.

A critical priority for the U.S. Department of Labor's Office of Disability Employment Policy (ODEP) and other Federal agencies is to invest in systems-change efforts that result in increased competitive, integrated employment opportunities for individuals with significant disabilities. This priority is reflected in the growing national movement called *Employment First*, a framework for systems change centered on the premise that *all* youth and adults with disabilities, including those with the most significant disabilities, are capable of full participation in competitive, integrated employment and community life. Under this approach, state government entities are urged to align policies, regulatory guidance, and reimbursement structures to promote and support competitive, integrated employment as the priority option of publicly-financed day and employment services for all youth and adults with disabilities. Many states have formally initiated their focus on *Employment First* through an official executive proclamation or legislative action and through implementation of state systems change and provider transformation to effectuate an *Employment First* framework. This requires a long-term commitment across and with multiple systems and stakeholders.

¹ ODEP defines **integrated employment** as work paid directly by employers at the greater of minimum or prevailing wages with commensurate benefits, occurring in a typical work setting where the employee with a disability interacts or has the opportunity to interact continuously with co-workers without disabilities, has an opportunity for advancement and job mobility, and is preferably engaged full-time. This definition aligns with the recent passage of the Workforce Innovation and Opportunity Act, which contains a similar definition for the term "competitive, integrated employment".

Many states are evaluating resources in an era of fiscal constraints and concern for sustainability. States have a strong desire to secure a better return on investment by aligning their policy and funding in support of an *Employment First* approach. They may not, however, possess the leadership commitment, knowledge, strategies, staff capacity, and technical resources necessary to lead and facilitate such change. To address this need, ODEP initiated the Employment First State Leadership Mentor Program (EFSLMP) in fiscal year 2012. EFSLMP helps participating states pursue systems change to fully implement the *Employment First* approach and make supports for competitive, integrated employment the primary service provision option for people with the most significant disabilities.

The intensive training and technical assistance that has been provided to these states through the EFSLMP has been focused on two primary areas:

- Facilitating cross-systems change and interagency collaboration at the state level by working with state governments (specifically the following state agencies: education, intellectual and developmental disability (I/DD) adult services, Medicaid, mental health, vocational rehabilitation and workforce investment) to develop their infrastructure and align policies, funding priorities, and desired outcomes to effectuate *Employment First*; and
- Assisting multiple state entities to strengthen their service delivery infrastructure to ensure that disability service provider networks (primarily comprised of community rehabilitation providers) have the executive and volunteer leadership commitment, staff capacity, business model, and operational focus necessary to help implement the *Employment First* vision.

To achieve this dual-strategy, state governments, provider agencies, persons with disabilities, families and care givers may benefit from access to an array of technical assistance supports, including national subject matter experts who can provide services and supports as described in Figure 1, as well as networking and information sharing with officials from other states that are implementing key elements of an *Employment First* systems change framework.

Figure 1. Technical Assistance (TA) & Support Strategic Areas for Assisting State Governments Undergoing Systems-Change and Provider Transformation Efforts



There are five common levers that facilitate state systems change endeavors. These include (as illustrated in Figure 2): demand change among target populations; development of evidence-based practices and evolution of models in service delivery; advances in the legal and policy landscape; maximizing efficiencies through goal alignment and resource coordination across systems; and demonstrated improvements in desired outcomes via rigorous performance measurement.

Figure 2. Facilitators of Cross-Systems Change Efforts



Additionally, the implementation of *Employment First* activities should be infused within a broader goal of ensuring that youth and adults with disabilities are meaningfully engaged in the community and have access to the individual supports required for full participation, optimal self-sufficiency, and socioeconomic advancement.

Through the efforts of the EFSLMP, a set of criteria to help states and service delivery systems successfully implement systems change within a comprehensive *Employment First* strategic framework has been developed. This technical brief introduces the *Criteria for Performance Excellence in Employment First State Systems Change and Provider Transformation*. ODEP developed the *Criteria*

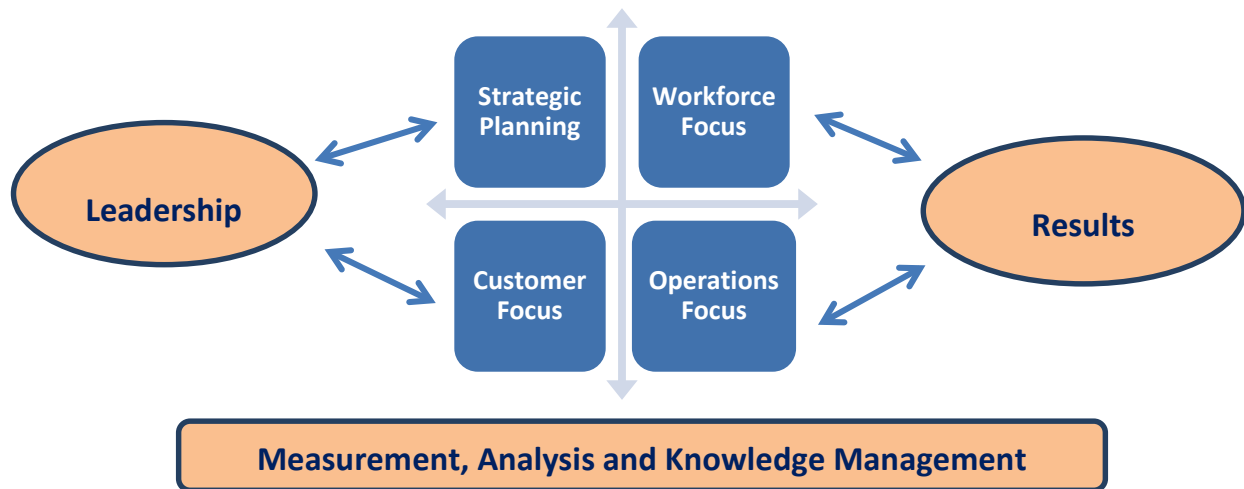
for Performance Excellence in collaboration with a pool of 18 national subject matter experts. The criteria has been tested and validated in conjunction with the provision of intense technical assistance to core state government teams², as well as more general information sharing, training, and technical support to an additional 43 states participating in ODEP's National Employment First Community of Practice. The purpose of the *Criteria for Performance Excellence* is: (a) to serve as a baseline tool for state governments and their service delivery systems in developing a roadmap for comprehensive *Employment First* systems change efforts; and (b) to clarify key definitions, effective practices, and service delivery strategies that lead to competitive, integrated employment.

² ODEP provided intensive technical assistance in fiscal years 2012-2014 to four core state teams (Iowa, Oregon, Tennessee and Washington state); increased funding allowed for ODEP to expand the number of core states in fiscal year 2015 receiving intensive technical assistance to fifteen core states (Alabama, Arkansas, District of Columbia, Delaware, Hawaii, Illinois, Iowa, Maine, Maryland, Michigan, North Carolina, Ohio, Pennsylvania, Tennessee and Utah). An additional four core states were added in fiscal year 2016 (Colorado, Connecticut, Missouri and New York), bringing the number of core states receiving intensive technical assistance through the EFSLMP to nineteen.

Criteria for Performance Excellence in Employment First Systems Change: Framework & Structure

A blended approach of top-down systems-change strategies³, combined with community-based capacity building activities initiated by key stakeholders, is critical to the successful implementation of an *Employment First* strategic framework. In alignment with the [National Baldrige Model's Criteria for Performance Excellence](#)⁴, the *Criteria for Performance Excellence in Employment First State Government Systems Change & Provider Transformation* is designed around seven key elements, as illustrated in Figure 3, including: Leadership; Strategic Planning; Customer Focus; Workforce Focus; Operations Focus; Results; and Ongoing Measurement, Analysis & Knowledge.

Figure 3. National Baldrige Model – Criteria for Performance Excellence in Systems Change



In order to develop the Criteria, multiple national subject matter experts were asked to develop, test, and validate a specific set of criteria that state governments and disability service providers can use to shape their *Employment First* systems change efforts and measure their progress over time in these seven specific categories.⁵ Table 1 outlines the key steps state governments should consider in meeting each of these criteria, and Table 2 outlines the key steps organizations community rehabilitation providers should consider in meeting each of these criteria.

The next section clarifies key service delivery strategies and effective practices that, when implemented with fidelity, meet all the key components included in the definition of *competitive, integrated employment*⁶, as well as aligns with policy guidance issued by Federal agencies.

³ These strategies include, but are not limited to: public policy, leadership development, strategic planning, funding realignment, and values-based cultural transformation.

⁴ (<http://www.nist.gov/baldrige>)

⁵ A list of the national subject matter experts involved in the development, testing and validation of the *Criteria for Performance Excellence* are included on the cover page of this document.

⁶ See footnote 1.

Accepted Service Delivery Strategies for Promoting Competitive, Integrated Employment

ODEP supports a number of effective practices that lead to competitive, integrated employment and socioeconomic advancement, including competitive on-demand job creation, customized employment strategies, various individualized supported employment services, self-employment, and entrepreneurship.⁷ ODEP encourages state governments to assess investments in day and employment services to ensure that: (a) these effective practices are being prioritized and are readily available to all youth and adults with significant disabilities; and (b) evaluate whether existing day or employment services funded in the state truly result in individualized competitive, integrated employment outcomes and optimal socioeconomic advancement.

To achieve competitive, integrated employment outcomes for prospective workers and job seekers with disabilities, a myriad of effective practices may be leveraged and applied by providers of disability services and supports. Those providers who have implemented a diverse model of various effective practices often have the most successful, sustainable service models over time. ODEP encourages state governments to prioritize and financially incentivize the following types of employment services and evidence-based effective practices that lead to competitive, integrated employment for individuals with disabilities:

- **Competitive Placement:** is the hiring of an individual with a disability by a business for a job on-demand through traditional hiring and recruitment processes. The competitive placement process is outcome-based and reliant on placement support only.
- **Customized Employment:** refers to services and supports that are provided to an individual with a disability in accordance with flexible, individualized strategies leading a negotiated relationship with an employer that focuses on unmet needs and other specific value-added to employers rather than open, demand job positions. Customized employment involves a highly individualized process of job seeker exploration, discovery, development of descriptive profile documents, customized employment planning, innovative representation methods, employer needs analysis, and representation by a job developer. Customized employment services dovetail with supported employment services at the point of successful job negotiation with an employer and thus may evolve into services and supports provided directly at the job location, including, if necessary, ongoing supports and services.⁸

⁷ It is also important to note that while volunteerism and unpaid training can assist individuals to obtain competitive, integrated employment, these activities should not in and of themselves be considered an employment outcome.

⁸ The Workforce Innovation & Opportunity Act includes for the first time a statutory definition of customized employment, defined as, “*competitive integrated employment, for an individual with a significant disability, that is based on an individualized determination of the strengths, needs, and interests of the individual with a significant disability, is designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer, and is carried out through flexible strategies, such as—* ‘(A) job exploration by the individual; (B) working with an employer to facilitate placement, including—‘(i) customizing a job description based on current employer needs or on previously unidentified and unmet employer needs; (ii) developing a set of job duties, a work schedule and job arrangement, and specifics of supervision (including performance evaluation and review), and determining a job location; (iii) representation by a professional chosen by the individual, or self-

- **Supported Employment** is the hiring of an individual with a disability by a business that is usually conditional on the support of an employment specialist, job coach, or other ongoing supports needed to maintain an individual with a disability in that job. The ongoing supported employment services necessary to maintain an individual with a disability in competitive, integrated employment are based on a determination of the needs of an eligible individual as specified in an individualized plan for employment. Additionally, supported employment services are intended to maximize integration of the individual within the workplace, with emphasis on facilitating the use of existing natural supports (e.g., co-workers, supervisors) supplemented as necessary with staff supports paid for through funds authorized by a designated state government entity (and often provided by a human service organization or other government contracting entity).
 - ODEP encourages states to assure the use of individualized supported employment services (SES) to facilitate competitive, integrated employment outcomes as opposed to focusing on group supported employment options. To be clear, competitive, integrated employment, by definition, does *not* include work crews, enclaves, social enterprise, or other forms of group employment.
 - Examples of SES strategies that lead to competitive, integrated employment include, but are not limited to: follow-along job coaching and other SES after customized employment or other strategies that foster a competitive, integrated employment outcome; and individualized placement and support (IPS)⁹.
- **Self-Employment:** is the identification of a job opportunity based on the desires and skills of an individual with a disability that includes the provision of supports that enable the individual to become successfully self-employed.
- **Entrepreneurship or Small Business:** refers to the process of actively earning income directly from one's own business, trade, or profession. A person is self-employed if he/she: (a) is responsible for obtaining or providing a service or product; (b) assumes the financial risk of profit or loss from operating the business; (c) earns income directly from their own business; and (d) is not required to have Federal income tax and FICA payments withheld from their earnings. Examples include: Ticket to Work Only Business; Vocational Rehabilitation-Supported Business for Start-Up; and Social Security Plan to Achieve Self-Support (PASS)-supported Business Start Up.

representation of the individual, in working with an employer to facilitate placement; and (iv) providing services and supports at the job location.” See <https://www.congress.gov/113/bills/hr803/BILLS-113hr803enr.pdf>. at 210.

⁹ IPS supported employment refers to evidence-based practices that help people with severe mental illness work at regular jobs of their choosing. Characteristics of IPS supported employment include: evidence-based practice; practitioners focus on client strengths; work is used to promote recovery and wellness; practitioners work in collaboration with state vocational rehabilitation and other service delivery systems; use of a multidisciplinary team approach; services are individualized and long-lasting; and reshaping the way mental health services are delivered in relation to employment. Key practice principles of IPS supported employment include: focus on competitive employment; eligibility based on client choice; integration of rehabilitation and mental health services; attention to client preferences; personalized benefits counseling; rapid job search; systematic job development; time-unlimited, and individualized support. For more information, please refer to the Dartmouth IPS Supported Employment Center at <http://www.dartmouthips.org/about-ips/>.

Table 1. Criteria for Performance Excellence in Employment First State Systems Change

AREA	CRITERIA
Leadership	<ul style="list-style-type: none"> • Adopt a comprehensive state government vision and set of goals and agreed upon desired outcomes for cross-agency systems change committed to the premise of <i>Employment First</i> through state policy development and administrative reforms. • Build and revitalize state leadership’s continued commitment to promulgating and enforcing the tenets, visions, goals, and financing of <i>Employment First</i>. • Promote ongoing professional development and mentoring of leaders within state government to cultivate a cadre of strong leadership capable of implementing a state <i>Employment First</i> strategic policy framework. • Build in incremental strategies for financially supporting, recognizing, and rewarding progress in accomplishing key performance-based milestones at state and local levels of government. • Leverage evolving Federal policy efforts and emerging Federal resources to advance key <i>Employment First</i> principles.
Strategic Planning	<ul style="list-style-type: none"> • Infuse and embed the state’s <i>Employment First</i> vision, goals, guiding principles, and conceptual framework within the planning process of all relevant state government agencies. • Develop operational agreements across various state publicly-financed systems resulting in: (a) the alignment of policy, practice, and funding strategies to allow for a consistent focus on specific performance-based results; and (b) the efficient leveraging of resources and effective coordination of services across respective systems.
Customer Focus	<ul style="list-style-type: none"> • Identify and educate stakeholders through transparency, information dissemination, and informed dialogue. • Meaningfully engage stakeholders through ongoing interaction in the development of the state’s <i>Employment First</i> vision, goals, and conceptual framework. Also ensure that stakeholders remain an integral part of the systems-change process with respect to implementing timelines, milestones, overall expectations, and evaluations. • Ensure appropriate feedback and participation in decision-making process related to policy reform, dissemination of effective practices, funding alignment, and outcomes measurement to create environment of collective action and collaborative ownership over state vision. • Solidify hands-on participation in <i>Employment First</i> implementation strategies from all major stakeholders, including self-advocates, families, employers, direct support professionals, provider organizations, and state agency program teams.
Workforce Focus	<ul style="list-style-type: none"> • Provide resources to support long-term capacity building efforts that lead to a strong state infrastructure of qualified personnel and direct support professionals across all relevant systems that are competent in the provision of effective practices that promote competitive, integrated employment outcomes for youth and adults with significant disabilities. • Provide ongoing on-site and virtual access to comprehensive training, technical assistance, and hands-on experiential knowledge translation in the delivery of effective practices that lead to integrated work-based learning experiences and competitive, integrated employment outcomes. • Consider accreditation/certification and provider contractual requirements that elevate the importance of professional development among system personnel and direct support professionals in the dissemination of effective practices.
Operations Focus	<ul style="list-style-type: none"> • Ensure existing and future contractual agreements among state government entities, provider networks and/or service delivery partners reflect the state’s <i>Employment First</i> goals and objectives. • Align reimbursement and rate structures to augment competitive, integrated employment outcomes.
Results	<ul style="list-style-type: none"> • Review trends in outcome data with respect to competitive, integrated employment outcomes of individuals with disabilities, including: setting, average hours worked, average wages, public benefits received, advancement, and retention. • Align performance tracking of employment services with other long-term supports (housing, financial capability, transportation, natural supports) and benefits planning/work incentives. • Track impact of enhancing reimbursement of effective practices on service delivery and outcomes. • Demonstrate cost-effectiveness of competitive, integrated employment supports through maximization of natural workplace supports, assistive technology, and job customization. • Document alignment of policies, funding priorities, and practice recommendations to reflect emphasis on competitive, integrated employment service delivery.
Measurement, Analysis and Knowledge Management	<ul style="list-style-type: none"> • Create shared performance-based outcomes and metrics across State government entities that incentivize coordination of public resources, collaborative service delivery and funding strategies, and capture tiered stages of development and success across systems. • Link data collection systems across State government entities through the development of a unique identification system (to track impact of public investments at individual-level over time). • Development of high-impact, relevant data to help inform continued public policy reform, operational practice updates, and funding alignment strategies. • High-impact knowledge translation through continued commitment to training, technical assistance, professional development, and communities of practice.

Table 2. Criteria in Performance Excellence in Employment First – Provider Transformation

AREA	CRITERIA
Leadership	<ul style="list-style-type: none"> Promote ongoing professional development and mentoring of leaders within provider networks to cultivate a cadre of strong leadership capable and committed to the development of competitive, integrated employment outcomes and socioeconomic advancement for people with disabilities. Build in incentives for supporting, retaining and rewarding “early adopters” of effective practices among staff.
Strategic Planning	<ul style="list-style-type: none"> Infuse and embed the state’s <i>Employment First</i> vision, goals, guiding principles, and conceptual framework within the organization’s strategic planning processes, consistent with similar efforts undertaken across relevant state government agencies. Develop, disseminate, and make readily available the provision of effective practices that lead to competitive, integrated employment for individuals with disabilities, as well as benefits planning, financial capability, and economic advancement strategies for all clients. Develop operational agreements across various state publicly-financed systems and provider networks resulting in the alignment of policy, practice, and funding strategies to allow for a consistent focus on performance-based results.
Customer Focus	<ul style="list-style-type: none"> Survey customers and stakeholders regularly to understand level of satisfaction and determine where areas of improvement are needed. Review service coordination processes to determine whether key steps in the process could be strengthened in terms of being more focused on person-centered, individual strategies, and experiential informed choice. Expand and improve upon existing assessment processes to ensure a rich collection of data on the individual’s strengths, gifts, and preferences that can be used to leverage multiple options.
Workforce Focus:	<ul style="list-style-type: none"> Realign organizational structure and standard operating procedures to allow the time, flexibility, and incentives required to develop professional staff in key areas critical to successful transformation. Ensure ongoing professional development, mentoring, coaching, and staff support promoting continued strengthening of skill sets critical for expanded business models. Optimize service time and ratio deployment for provision of long- term supports, crisis interventions, and new job starts within provider network. Consider incentives for staff to facilitate clear measurable performance outcomes for competitive, integrated employment and to effectively address individual and cultural resistance to change.
Operations Focus	<ul style="list-style-type: none"> Diversify funding streams to optimize available support for competitive, integrated employment services. Expand the provision of services to include a stronger focus on the dissemination of effective practices that result in competitive, integrated employment outcomes. Promote the modernization of operational processes including information technology/electronic record-keeping and decentralized staffing models to successfully meet growing demand for the provision of competitive, integrated employment strategies. Consider reconfiguration of service management elements within provider organizations (including, but not limited to, communication, data collection, logistics, technology, transportation, billing systems, supervision, and customer satisfaction) and infusion of “lean management” techniques.
Results	<ul style="list-style-type: none"> Grow percentage of competitive, integrated employment placements over baseline, and capture length of time from start of service to placement. Coordinate employment efforts with other long-term supports (housing, transportation, natural supports) and benefits planning/work incentives. Survey customers and stakeholders regularly to understand level of satisfaction and determine where areas of improvement are needed. Track staff development milestones, including training/TA received, credentials/certification completed, etc. Track impact of applying effective practices to internal daily operations and service approaches. Demonstrate cost-effectiveness of competitive, integrated employment supports through maximization of natural workplace supports, assistive technology, and job customization. Align policies, operational procedures, and funding to reflect adoption of effective practices and competitive, integrated employment service delivery.
Measurement, Analysis and Knowledge Management	<ul style="list-style-type: none"> Create shared performance-based outcomes and corresponding metrics across various divisions of the organization to incentivize effective coordination of human and technical resources and collective action around pursuance of organizational strategic goals. Establish bench-marks from baseline data and collect high-impact, relevant data to help inform continued organizational restructuring, internal policy changes, operational practice updates, and development strategies. Translate high-impact knowledge through continued commitment to training, technical assistance, professional development and communities of practice.

Developing Comprehensive Funding Strategies to Support Competitive, Integrated Employment

Aligning Goals & Person -Focused Services with Funding Options

State governments and their respective provider networks should consider conducting a thorough assessment of all current and potentially available funding streams across relevant state agencies to support the implementation of *Employment First* systems change and provider transformation objectives. The following key questions may be considered to guide this analysis:

- What are the strategic goals and corresponding objectives being prioritized?
Competitive, integrated employment is the desired outcome. Realignment of policy, funding and practice across systems to effectuate this desired outcome is the strategic goal. Transformation of existing provider business models that perpetuate segregated outcomes; increasing the capacity and competencies of direct support professionals in the dissemination of evidence-based effective practices that lead to increased competitive, integrated employment of individuals with disabilities; and the coordination of services and leveraging of resources across systems to efficiently and effectively advance the desired outcome are all representative objectives that correspond to the strategic goal.
- How do the strategic goal and objectives align with the foci of one or more funding streams, and what changes may be necessary to solidify this alignment of mission/goals/objectives with a diversified resource plan over time?
- Based on this goal, who are the target populations to be served and included in the goal?
(It is recommended that state Employment First initiatives be applied across disability and not apply solely to a narrower subpopulation(s) of individuals with a specific disability.)
- What are the funding opportunities that can potentially serve each of these subpopulations to address the strategic goal?

As Figure 4 demonstrates, systems change efforts should consider an alignment of strategic goals, target populations, and funding streams.

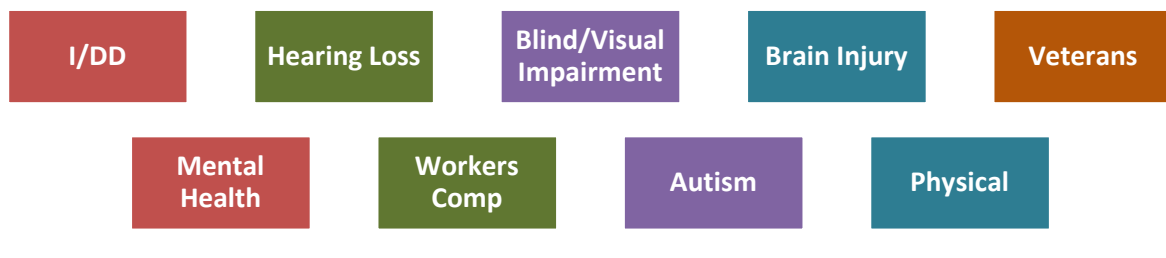
Figure 4. Aligning Goals, Target Populations, and Funding Options



Assessing Your State's Population & Customer Base

Understanding the state's composition of youth and adults with disabilities, the services they receive, and the desired outcomes to be achieved under an *Employment First* framework is critical to fully exploring and exhausting funding strategies to promote competitive, integrated employment. Figure 5 illustrates specific subpopulations of individuals with disabilities that states may want to target in the application of *Employment First* strategies. These subpopulations include, but are not limited to: intellectual/developmental disabilities (I/DD); hearing loss; blind/visual impairment; brain injury; veterans; mental health needs; workers compensation recipients; autism; and physical disabilities. It is recommended that states apply *Employment First* principles in the development of goals, services, and supports for all individuals with disabilities.

Figure 5. Focusing *Employment First* Efforts across Disability



Representative List of Potential Funding Streams Available to Leverage in Financing Competitive, Integrated Employment Options for Youth and Adults with Disabilities

Local and state entities engaged in the delivery of direct supports and services to individuals with significant disabilities need to think strategically about the comprehensive leveraging of resources across systems to support individual goals focused on attaining competitive, integrated employment. Table 3 outlines a representative set of available resources that state governments and provider networks should consider in developing comprehensive funding strategies to ensure optimal funding and sustained support for implementing *Employment First* systems change and provider transformation objectives.

Table 3. Checklist of Funding Streams to Support Individuals with Disabilities in Integrated Employment

- Education Transition Funding
 - ✓ Individuals with Disabilities Education Act Part B Discretionary Funds
 - ✓ Charter School Transition Funds
- Medicaid Waivers for various long-term supports and services (LTSS) that can help individuals with disabilities sustain competitive, integrated employment and socioeconomic advancement
 - ✓ Often focused on one or more subpopulations, including but not limited to I/DD, mental health, brain injury, sensory impairment, etc.
 - ✓ Opportunity to fund innovative employment services, benefits counseling, self-determination, peer support, transportation, and other services that can be used to advance competitive, integrated employment.
- Medicaid State Plan Services such as Personal Care, Rehabilitation, Durable Medical Equipment and Home and Community Based Services (1115; 1915(b/c); 1915(j); 1915(k);
- Medicaid Balanced Incentive Programs
- Medicaid Buy-In Levels State Funding
- Money Follows the Person Grants and Operational Protocols
- Mental Health System General Service Funding Integration
- Ticket to Work Employment Networks
 - ✓ Providers
 - ✓ American Job Centers
 - ✓ Vocational Rehabilitation Categories (Target Markets)
- Vocational Rehabilitation
 - ✓ Title I
 - ✓ Supported Employment Services
- Workforce Investment Service Funding Integration
 - ✓ Core
 - ✓ Intensive
 - ✓ Training
- Veteran-Specific Funding Initiatives
- Benefits Assistance & Planning Services including all Social Security Administration Work Incentive Options
- Department of Commerce/Economic Development Administration Grants/Loan Programs
- Traumatic Brain Injury Planning Grants financed through the Health Resources & Services Administration (HRSA)
- State Independent Living Council Grants and Resources from Local Centers on Independent Living
- Children with Special Health Care Needs Grants from U.S. Department of Health and Human Services' Health Resources and Services Administration
- Small Business Administration/Small Business Development Centers
- County/Local Government Funding
- Private Sources
 - Foundations
 - Private Businesses/Corporate Foundation Funding
 - Financial Services Institutions (banks, credit unions, and other asset development entities supporting the fostering of financial capability and economic advancement strategies for people with disabilities)
- Local Non-Profit Organizations focused on Providing Technical Assistance and Informational Resources related to Asset Development, Voluntary Tax Assistance, Benefits Planning, and other Financial Capability & Economic Advancement Strategies