I. INTRODUCTION

The Office of Disability Employment Policy (ODEP) within the U.S. Department of Labor (DOL), along with many other stakeholders, is working to improve outcomes for youth ages 14 to 24 who receive Supplemental Security Income (SSI) benefits (hereafter called youth SSI recipients). ODEP is funding a project targeting youth SSI recipients and those at risk of SSI participation (that is, those currently not receiving SSI). The project's ultimate goal is to identify existing research and lessons from the field in order to recommend potential research questions and promising, testable strategies for promoting transitions to sustained, gainful employment.

To help inform the findings and to make recommendations for future research, ODEP required the project to establish a Community of Practice (CoP) comprised of experts in SSI and transition. The CoP participated in three primary activities. First, it contributed to an online platform to share knowledge related to the transition of youth SSI recipients toward sustained, gainful employment, including the identification of barriers and best practices related to this population. Second, CoP members provided transition-related resources of interest to ODEP, the project team, and other CoP members. Third, members participated in webinars focused on the project's research questions in order to guide ODEP and its federal and state partners in the formulation of research and policy recommendations.

In this report, we document the role of, involvement in, and contributions of the CoP to this project. We begin by describing the guiding approach for organizing and drawing on the expertise of the CoP and then turn to lessons learned about the CoP's organization. Appendices include a list of CoP participants and summaries of the key points discussed during each CoP meeting.

II. COMMUNITY OF PRACTICE DESCRIPTION

A CoP can be an effective strategy for bringing together professionals with a common purpose who agree to work together to solve problems, share knowledge, cultivate best practices, and foster innovations. At ODEP's request, the CoP for the youth SSI project represented a diverse group of experts in secondary transition, SSI, and other areas, with the intent to encompass varied perspectives on best practices for promoting the employment and economic self-sufficiency of youth SSI recipients. The technical input offered by the experts included recommendations for ongoing research and policy options.

Content moderator. A content moderator directed the CoP and assumed several roles. In collaboration with the project team and ODEP, the moderator developed a plan for engaging the CoP to ensure that project activities encouraged CoP involvement while eliciting comments and suggestions in a timely and efficient manner. The moderator developed the CoP meeting topics so that each meeting surfaced relevant information for project activities, and she organized and moderated each meeting. In addition to shaping and leading discussions at the meetings, the moderator fostered ongoing communication by connecting members through email reminders about meetings and activities. She also posted on a SharePoint site (described below) information, resources, and other material identified by the members and the project team.

employment group were unsuccessful because the solicited individuals were not able to commit adequate time to this role. We relied on a project team member—an expert in the area—to serve as the facilitator for the employment group. Facilitators (other than the project team member) received a $500 honorarium for their efforts.

B. CoP activities

To foster relationships and the active engagement of CoP members, the content moderator developed synchronous and asynchronous interactions with the group. The varied interactive activities were intended to promote and solicit innovative ideas, new knowledge, and useful examples from the CoP's members. Synchronous activities included regularly scheduled meetings to discuss project issues. Asynchronous activities focused on engaging members before and after CoP meetings through an interactive online platform (SharePoint) that offered flexibility in how members could participate, permitting interactions among members as their schedules and interests dictated. Below, we further describe the CoP activities related to the online platform and the meetings.

Interactive online platform. SharePoint, an online platform, provided a virtual meeting space for members to collaborate with one another. The secure site allowed CoP members to engage in dialogue and share ideas before and after meetings. A total of 31 members contributed an average of 3.6 posts (ranging from one to 14 per active member) through August 2, 2018. Each month, we posted to the affinity groups' discussion boards a set of unique questions related to the upcoming meeting. The affinity group facilitators helped stimulate input from and dialogue among members by posting questions and ideas to the site. Before the live meeting, the content moderator synthesized the information posted by members on the SharePoint site and distributed the synthesis to the affinity group facilitators for discussion during the CoP meetings.

We designed the SharePoint site to accommodate a separate discussion board for each affinity group. The individual pages allowed affinity group members to know the identity of other members, to hold discussions, and to exchange resources. Other features of SharePoint included announcements, member lists, featured resources, and a calendar of events.

Meeting agenda and guide. Before each CoP meeting, the project director and content moderator prepared a meeting guide and other pertinent materials for email distribution to members. The meeting guide included the meeting agenda (reviewed by ODEP staff), guiding questions for each affinity group, links to research articles, and questions for reflection. The meeting guide also provided room for participants to document their notes and reflections during that session's discussion.

Meetings. To set expectations around how and when to participate in the CoP, we scheduled five monthly meetings and used the same procedures for each meeting, thereby establishing a predictable rhythm for the CoP members (Table 1). The central purpose of each CoP meeting was to gain from the collective knowledge and experience of the members. In particular, each meeting sought to solicit input on (1) research evidence regarding factors that effectively contribute to adult employment for youth SSI recipients; (2) new perspectives on the interpretation of relevant policy and practice implementation; and (3) emerging evidence, policy, and practice perspectives. The meetings were organized so that CoP members participated in activities preparatory to each meeting as well as in post-meeting discussions.

III. LESSONS LEARNED

The ultimate purpose of the CoP was to gain input and recommendations from experts on the mix of research that would be of highest value to the government. The active engagement of 76 members with different interests, wide-ranging areas of expertise, and busy schedules required flexibility and the use of a variety of strategies to maximize the timely involvement of members. Below, we highlight several lessons learned from this CoP experience.

Members did not consistently use SharePoint. One of the most difficult challenges was to keep members engaged between meetings. Even though we created a SharePoint site as an online collaborative platform for members' open dialogue, members did not access it regularly, and most never posted to the site. One potential obstacle to using the site was that it required a password; some members reported difficulty in remembering or resetting their passwords. As an alternative to using the site, some members emailed the content moderator with their ideas. The content moderator then posted these ideas to the SharePoint site.

Establishing affinity groups can aid the effective management of both CoP members and their input. With 76 members, we expected considerable input and discussion. Organizing the CoP members into affinity groups helped manage the members as well as the input, ideas, and recommendations that they generated. Although the affinity groups were intended to keep members engaged by not overwhelming them with information, some members reported that they wanted to know more about what was discussed in the other groups. To address this issue, members had the flexibility to observe and contribute to other affinity groups on SharePoint. Email reminders to members provided another strategy to ensure robust representation from each affinity group in CoP meetings. These emails came from project staff as well as from the affinity group facilitators. Our aim was for at least three members from each affinity group to participate in the live meeting discussion. We met that goal for all but the last meeting, in which only two members of the health affinity group attended. A tactic that we did not adopt but could adopt when a large CoP is divided into smaller groups is to hold at least one separate meeting with each of the smaller groups, instead of conducting meetings with only the larger group. Such an approach might encourage broader participation among members who might not participate in larger meetings while emphasizing the value of the smaller groups.

The affinity group facilitators can help engage CoP members. We selected facilitators with diverse experience and expertise in their content area. The role of the facilitators was to support the content moderator in keeping members engaged in both the live meetings and on SharePoint. We had varying success with facilitator involvement on SharePoint and outreach to members, with two facilitators more involved and two less involved with these efforts. The two affinity groups with active facilitators, along with the affinity group led by project staff, tended to have more involved members. Those facilitators whose day-to-day work aligned more closely with the purpose of the CoP were more actively engaged, perhaps influencing both their work and their involvement with affinity group members.

The online efforts to engage the CoP between monthly meetings required considerable content moderator focus. The role of the content moderator was to cultivate and sustain CoP members by encouraging participation through email reminders, reporting CoP activity through meeting guides and summaries, and managing CoP events (including meetings and live

Name	Affiliation	Affinity group: Employment	Education	Health	Benefits and Financial Literacy	System Linkages
Golden, Thomas	Cornell University				X	
Grandison, Claire	Community Legal Services of Philadelphia				X	
Hart, Debra	Think College		X			
Hartman, Ellie	University of Wisconsin-Stout (PROMISE)	X				
Hemmeter, Jeffrey	Social Security Administration				X	
Herrington, Loretta	World Institute on Disability	X				
Hippolitus, Paul	World Institute on Disability	X				
Hopkins, Debby	Shenandoah Valley Workforce Development Board	X				
Houtrow, Amy	University of Pittsburgh			X		
Johnson, David	University of Minnesota		X			
Jones-Parkin, Tricia	Utah’s Division of Services for People with Disabilities				X	
Jordan, Lisa	Human Solutions LLC	X				
Karhan, Andrew	New York Employment Service System (PROMISE)			X		
Karpur, Arun	Cornell University (PROMISE)					X
Keeton, Beth	Griffin-Hammis Associates	X				
Kirkbride, Lynn	U.S. Business Leadership Network	X				
Kohler, Paula	University of Central Florida		X			
Love, Nicholas	World Institute on Disability	X				
Mank, David	Indiana University	X				
Mazzotti, Valerie	University of Oregon		X			
McMillan, Elise	Vanderbilt Kennedy Center for Excellence in Developmental Disabilities					X
Morningstar, Mary	Kansas University		X			
Nord, Derek	Indiana University	X				

		Affinity group				
Name	Affiliation	Employment	Education	Health	Benefits and Financial Literacy	System Linkages
Parish, Susan	Northeastern University			X		
Perrin, James	Massachusetts General Hospital			X		
Pierce, Jill	Maryland State Department of Education, Division of Rehabilitation Services	X				
Plotner, Anthony	University of South Carolina					X
Raghavan, Ramesh	Rutgers School of Social Work			X		
Richards, Curtis	Institute for Educational Leadership					X
Rodgers, Rylin	Indiana University			X		
Rosenberg, Richard	CaPROMISE	X				
Ruddell, Carol	Utah State Department of Workforce Services					X
Runner, Taylor	Human Resource Development Foundation					X
Salon, Rebecca	LEAD Center					X
Schmidt, Eric	Maryland State Department of Education, Division of Rehabilitation Services					X
Shandra, Carrie	Stony Brook University	X				
Shea, Annette	Administration for Community Living, U.S. Department of Health and Human Services			X		
Shogren, Karrie	Kansas University		X			
Smith, James	Vermont Department of Disabilities, Aging and Independent Living	X				
Spain, Jayne	Minnesota Department of Education		X			
Stuart, Christy	Maryland Department of Education		X			
Test, David	University of North Carolina-Charlotte					X
Threlkeld, Marsha	PIVOTAL Consulting and Training	X				
Unruh, Deanne	University of Oregon		X			

		Affinity group				
Name	Affiliation	Employment	Education	Health	Benefits and Financial Literacy	System Linkages
Vallas, Rebecca	Center for American Progress					X
van Stone, Maureen	Maryland Center for Developmental Disabilities					X
Verstegen, Dale	TransCen		X			
Weidenthal, Corinne	Office of Special Education Programs, U.S. Department of Education		X			
West, Hershell	Arkansas PROMISE				X	
Williams, Brent	Arkansas PROMISE					X
Wilson, Jamie	Office of Management and Budget			X		
Wohl, Allison	Association of People Supporting Employment First	X				
Xavier, Joe	California PROMISE					X
Ziemke, Barb	PACER		X			
Total	**76**	**23**	**15**	**10**	**12**	**16**

APPENDIX B. SUMMARY OF FIRST MEETING OF THE SSI YOUTH FORMATIVE RESEARCH PROJECT

The purpose of the first Community of Practice (CoP) meeting of the Supplemental Security Income (SSI) Youth Recipient and Employment Transition Formative Evaluation was to orient CoP members. This meeting was the first of five CoP meetings.

To accommodate the 71 members of the CoP, the project team hosted two orientation meetings. We held the first meeting on Wednesday, December 13, via On24, and the second was conducted on Tuesday, December 19, via WebEx. The two meetings drew 54 CoP members (40 for the first meeting and 14 for the second), for a response rate of 71 percent. Todd Honeycutt, project director, facilitated the meeting. Other speakers were members of the project team: Kirk Lew, federal project officer with the Office of Disability Employment Policy (ODEP); Dave Wittenberg and Rich Luecking, senior advisors; Kelli Crane, content moderator; and Sarah Palmer, project manager.

The initial CoP meeting provided an overview of the following:

- ODEP's premise for funding this formative research project and its interest in youth in transition
- Project activities and purpose
- Role of the CoP members and activities
- Research topic areas, including practice and program innovations, target population, and evaluation design options

The On Demand webinar can be accessed through the registration link. The PowerPoint slides and a recording of the meeting will be available on the CoP SSI Youth SharePoint homepage within two weeks following the meeting.

A. Questions and answers

Members had the opportunity to pose questions at the end of speakers' presentations. The questions and the project team's answers are listed below.

- Q: What time on January 17 is the first webinar?

  A: All webinars will be held at 2:00 p.m. Eastern Standard Time (EST) to accommodate members participating across the country.

- Q: Will CoP meetings and webinars be recorded?

  A: Yes, all CoP meetings and topical webinars will be recorded and archived on the project's SharePoint site.

- Q: Are you partnering with the technical schools?

  A: The project is not partnering with technical schools per se; however, some members represent career and technical education interests.

- Q: We have a regular project team meeting every third Wednesday of the month from 2:00–3:30 p.m. EST.

  A: To accommodate various CoP member schedules, we will host future meetings on different days of the week.

- Q: Can you share the dates and times of future meetings?

  A: We have secured dates and times for the CoP meetings through May 2018. The dates are as follows:

  Meeting 2: Wednesday, February 7, 2:00 p.m.

  Meeting 3: Thursday, March 22, 2:00 p.m.

  Meeting 4: Friday, April 27, 2:00 p.m.

  Meeting 5: Thursday, May 24, 2:00 p.m.

- Q: I’ve designed and worked with SSA [Social Security Administration] on a number of interventions from a policy perspective. Is there any chance that SSA would be willing to talk about statistically significant change in behavior that would move SSA to actually change public policy?

  A: This topic is one that members can raise during affinity group discussions as an option to propose.

- Q: When will facilitators be appointed to the affinity groups?

  A: The affinity group facilitators are being confirmed. The project team will announce the facilitators by January 8, 2018.

- Q: Do I have to sign up on SharePoint for my affinity group?

  A: Yes, once you are logged onto SharePoint, please click on your assigned affinity group and add yourself as a member. Under “Affinity Group Members,” click “add new item” and complete the information accordingly.

- Q: The affinity group areas seem to be missing a few critical components that are unique to youth recipients of SSI. Are you okay if we bring those areas up in our current affinity group discussions?

  A: The affinity groups were identified to help better organize the 71 members of the CoP and offer an efficient way for collaboration. We recognize that there are other important areas to consider as we further explore the transition to employment for SSI youth recipients. Please feel free to discuss these components within the affinity groups.

B. Meeting survey

At the conclusion of the meeting, CoP members were asked to respond to a “2-1-1” survey. The survey asked members to respond to three items: two ideas for topical webinars, one idea that resonated with me (the CoP member); and one idea to further explore. The responses to each survey question are included below as Tables A, B, and C.

C. Next steps

On Wednesday, January 17, 2017, at 2:00 p.m., we will host the first topical webinar. This interactive webinar will be open to professionals beyond the CoP. Our team will share information on SharePoint before the webinar to promote continued reflection and information among CoP members. The topic for this first webinar is the impact of benefits counseling on employment outcomes for youth recipients of SSI. The speakers are being identified and confirmed.

We will hold the second CoP meeting on Wednesday, February 7, 2017, at 2:00 p.m. This meeting will focus on innovations. We will provide additional information before the meeting.

Table A. Responses to request for two ideas for topical webinars

Number	Response
1	A more in-depth look at the population we are dealing with. What kinds of disabilities are most common? What is the racial and ethnic and gender breakdown?
2	ABLE Act information.
3	An overview/findings of what is being/has been identified as successful strategies/practices (important for secondary educators and providers) regarding what’s working from the PROMISE work.
4	Apprenticeship and preapprenticeship.
5	Business mentoring, models that promote smooth transitions.
6	Career Pathways (CTE completer programs) for students with disabilities (at risk for dropout and at risk for not attaining high school diploma).
7	Cross-system collaborations under WIOA and to support transition to employment.
8	Differentiate pre-ETS from "transition services."
9	Early intervention programs addressing employment.
10	Educating those supports on SSI and employment.
11	Effective PD for CTE instructors, to include youth with disability access and success in CTE coursework.
12	Employer-based initiatives
13	Employer engagement: training for interviewing and managing people with disabilities.
14	Evaluation strategies for interventions as they impact Indicator 14
15	Explore the promise and potential pitfalls of how pre-ETS are being (or not being) provided.
16	Family and youth engagement: What works/what doesn’t.
17	Focus on system-based interventions (e.g., professional practices, school-based interventions).
18	Future funding options for PROMISE-like activities not already funded through WIOA.
19	How legislation is impacting the population and interventions, e.g., WIOA.
20	Increasing parent expectations re: work and postsecondary education engagement.
21	Lessons learned from the promise grants’ initial findings.
22	Lessons learned to date from SSI research projects.
23	Models of interagency collaboration
24	Most people do not have access to robust in-school or adult services/supports. It is critical to consider informal support intervention.

Number	Response
25	Natural supports (i.e., family rep payee)/
26	One thing we are testing in PROMISE is: Is it helpful to have a case manager to help to link PROMISE youth and their family members to needed local services and supports? I think all the projects are all learning the answer is "yes," but what isn't clear is where that case management would reside? Maybe a webinar exploring the different possible options: through local SSA (need to hire staff to do this, not sure if this is feasible or not; all youth on SSI are eligible for Medicaid, so maybe through the state Medicaid program? Is this possible? Through DVR? Would keep the focus on employment, but SSA or Medicaid would have to have someone help link the youth to DVR, and this may be trickier to do at younger ages. Through schools? Not all youth have an IEP and not all are engaged with schools, and some of this case management would probably be considered outside the scope of school; SSA or Medicaid contract with a local service provider, university, or other entity. Through local independent resource centers and/or aging and disability resource centers? Other ideas?
27	Other rules that interact with SSA.
28	Overview of current programs that support training and employment for people with disabilities, as well as any current research on this topic.
29	PD for CTE instructors, to include youth with disabilities in CTE coursework.
30	Please include youth speakers who made the transition.
31	Pre-ETS for transition youth.
32	Project SEARCH model.
33	Give examples of meaningful and effective pre-ETS that provide actual evidence-based interventions to youth.
34	Reasons why kids at 18 stay on the SSI rolls.
35	Review of PROMISE research and interventions.
36	Review some of the largest lessons learned under national projects, and then discuss how they have impacted policy, if at all.
37	SSA 301 information.
38	SSA rules.
39	SSI work incentive: How to remove administrative and increase access to services.
40	Supporting financial capability.
41	Technology to support SSI youth in employment success from a highly successful employment organization working with SSI youth.
42	The role of benefits counseling to dispel myths about SSI and work.
43	Transition from high school to adult services: Models that work (often young people don't make the leap).
44	Transportation to work for SSI youth (what is being done and what is needed), and I would like to hear from an actual transitional teacher (or reports from them) on what the primary concerns are for youth with disabilities.
45	Updated guideposts.
46	What can we do to help ensure better implementation of work incentives? Existing work incentives are helpful, but can be difficult to navigate, so more consumer-friendly implementation of existing available work incentives is needed. Changes in youth or parent income, assets, working, moving, and child support can have an incredible impact on benefits. SSA has limited time to attend to these changes, and these changes do not always make sense to the families. SSA sends letters, but youth and family members sometimes do not understand or may miss the many letters from SSA, so they ignore the letters, which leads to problems. What can we do to address this ongoing issue? (Of note: Even the student-earned income exclusion is not always applied correctly without extra help from a benefits specialist; see recent GAO report.)
47	Work-based learning experiences.

4. Benefits and finances

- What benefits counseling and work incentive strategies have encouraged youth receiving SSI to seek employment?
- Were these services paired with employment strategies or offered independently?
- What benefits management strategies for youth receiving SSI have anecdotal effectiveness that might warrant more empirical research?

5. System linkages

- What innovative strategies for interagency collaboration lead to positive employment outcomes for youth receiving SSI?
- Are there any policy developments that encourage and strengthen collaboration between agencies to promote the employment outcomes of youth receiving SSI? If so, how are these collaborative efforts being sustained? How are these strategies for collaboration being replicated?
- What interagency collaboration strategies for youth receiving SSI have anecdotal effectiveness that might warrant more empirical examination?

B. Key discussion points

Key research questions to generate discussion and to document promising interventions and strategies that could help youth receiving SSI achieve sustained, gainful employment were posted on SharePoint. Below is a summary of the SharePoint discussion boards, grouped by affinity group:

1. Employment

- California's YTD and PROMISE programs have identified important supports and strategies for helping youth receiving SSI obtain employment.
  - Family-centric coordination and services and supports to family members have been "game changers for attitude and movement to employment."
  - Youth need role models and mentors who promote work.
  - Expectation for work at a younger age.
- Wyoming offers paid work at an earlier age, which has helped youth transition to adult vocational rehabilitation (VR) and has given them realistic employment goals.
- Maryland offers incentives for helping youth and families gain paid employment. This process has allowed staff to engage family and youth in other important services.
- Agreement on early mentorship is key. Early mentorship sets an expectation that work leads to financial independence.
- More outreach and training of employers is important to create a truly diverse workforce.
- Ideas to explore further:

  - Conduct further research on programs that blend career and technical education, or academics and work experiences, to determine the rate at which youth who receive SSI participate, and to assess the long- and short-term impacts.
  - Have the CoP host a webinar that highlights successful employment initiatives documented in current literature.
  - Identify employment practices to be shared with employers so they can expand the diversity of their workforce.
- Additional questions for the CoP:
  - What other strategies, practices, or combination of interventions might need more empirical exploration?

2. Education

- Skills to Pay the Bills is a financial education tool or strategy that is being implemented by schools to transition-age students.
- Financial education is making a difference where it is available, but it is not a requirement and is implemented inconsistently (according to Maryland PROMISE).
- A suggestion from Maryland is to implement a strategic plan that includes transition to work as one of three action areas. There are five key strategies (strategic collaboration, family partnerships, evidence-based practices, data-informed decision making, and professional learning). School systems use the implementation strategies as a blueprint to effectively move the work.
- Family involvement is crucial.
  - Maryland has family ambassadors—families who see agencies and families of older students speak about expectations and possibilities. This is a proven strategy that ensures buy-in at an earlier age.
  - Maryland uses a strategy of common messaging, which provides consistent information about transition resources and families at various stages of the transition process.
- Create connections with postsecondary programs.
  - California works with community colleges to help youth with intellectual and developmental disabilities enroll in college courses. The state specifically works with Think College.
  - The Maryland Inclusive Higher Education Collaborative has instituted a two-pronged approach, using state funding to develop a postsecondary program in a four-year IHE and enhance the transition programs for youth ages 18 to 21 in local school systems.
- Ideas to explore further:
  - Provide access to CTE

  - Address a growing number of students on IEPs who will not be eligible for adult services
  - Connect to Labor partner and the America's Job Centers for employment training when school ends
  - Expand alternate career pathways by using community colleges and trade schools for students who are staying beyond four years, possibly pursuing a diploma and accessing stackable credentials

- Additional questions for the CoP:
  - What secondary education strategies lead to positive employment outcomes for youth receiving SSI?
  - What postsecondary education strategies lead to positive employment outcomes for youth receiving SSI?

3. Health

- Idea to examine further:
  - What is a medical home, and how does it fit into a system that promotes gainful employment for youth who on SSI?
- Additional question for CoP members:
  - What strategies are needed to address health issues of youth on SSI to help them achieve successful employment outcomes?

4. Benefits and finances

- It is necessary to set expectations for work earlier since youth receiving SSI have almost zero possibility of ever being adversely impacted by work.
- Contemplative and pre-contemplative talking points help to engage youth and families in benefits counseling. Also, it is important to consider stages of decision-making.
- The current CWIC model does not work for youth receiving SSI. That model was created for individuals who are motivated to work. It does little to engage youth and families who fear the loss of benefits.
- Discussion on financial education included the following points:
  - Financial education can help engage youth receiving SSI in benefits counseling.
  - A useful tool is the Financial Literacy and Education Commission and the Financial Education Reference Guide, developed by Wells Fargo. (Links to both resources are posted on SharePoint.)
  - Secondary transition education may use financial literacy tools.
  - All individuals receiving SSI should be connected to financial education. Youth, in particular, should be connected to local credit bureaus. Local resources, anecdotally, are more effective in engaging youth than online tools.

  - The entire family should learn about financial literacy. PROMISE sites take this approach. The California PROMISE program, for example, requires that the family agree to have some earnings replace the loss of SSI that the family probably depends on, and to save some of the earnings. The remainder becomes the youth's "reward" for a day's work.
  - The Utah State Board of Education now requires a .5 credit in financial literacy to graduate high school. Not many students in special education are taking the class.
  - Arizona emphasizes the importance of building asset development networks. The objective is for the team to come together to discuss how they could help individuals meet their goals. This allows for successful benchmarks or closures for all partners.
- According to YTD, benefits counseling tied to other intervention works. It is important to recognize that benefits counseling is not a one-time meeting but a continual process.
- To be successful, consistent benefits counseling must provide concrete positive examples, involve family in the process, and offer employment options.
- Ideas to explore further:
  - Study the impact of financial education tools used in secondary education.
  - Determine what types of tools could be built into systems to incorporate financial education (for example, apps).
  - Build more evidence on strategies that work to engage the whole family in benefits counseling.
  - Conduct and identify studies on intervention strategies by age group.
  - Publicize information on ABLE Accounts.

5. System linkages

- Innovative strategies include meeting with partners face to face, spending time to listen and understand how other systems work, and meeting regularly with other system representatives. Several state practices with innovative strategies for systems linkages were mentioned:
  - Utah has the Coordinating Council for Persons with Disabilities. A Utah statute requires that the directors of agencies serving people with disabilities meet monthly to address common concerns, goals, and so on.
  - Maryland's transition team is receiving intensive support from the National Technical Assistance Center on Transition (NTACT) to develop a flow of transition services. Also, via PROMISE, they are developing a data-tracking tool to be used across state partners.
  - California has a number of partnerships. The California Competitive Integrated Employment (CIE) Blueprint was developed in response to WIOA requirements, and the Employment First Policy encourages and strengthens collaboration among

agencies to promote employment outcomes for job seekers, including youth receiving SSI.

- Collaboration models with empirical support include CIRCLES, YTP, and Maryland Seamless Transition Collaborative.
- The group discussed connecting youth to America's Job Centers.
- Ideas to explore further:
  - Linking to partners beyond disability specific partners, but also the generic workforce, as well as other agencies that provide services based on need, not on disability.
  - Connecting to medical homes for these system linkage efforts. (This comment was also posted on the health discussion board.)
  - One area where systems-level changes need to occur is social services. In the welfare world, there's a prevalent belief that disability equals inability to work. This warrants further discussion of the broader context of poverty in which these youth and families live.

C. Recommendations for practice and research

After the CoP meeting, eight members responded to three survey questions, indicating (1) what parts of the discussion resonated with them, (2) what questions they still have, and (3) what ideas they have for further research and practice. Their responses are as follows:

1. What resonated

- The role and importance of family involvement
- The importance of financial education at an early age
- The need for more research-based promising practices
- Increased use of American Job Centers
- Implementing benefits counseling as an ongoing process
- The lack of quality research that disaggregates youth who are on SSI within disability research
- The fact that secondary schools and transition programming need more professional development regarding implementing predictors for postschool success and other evidence-based practices
- Exploring the impact of ABLE Accounts

2. What questions CoP members still have

- What is the intersection between child and adult services for youth and young adults who access SSI?
- Is there any research regarding the stigma of SSI participation by employers? Parents? Youth?

- How can we best identify the most promising practices that link schools, the workforce, CRPs, and VR?
- Can we link all of this work to Career Pathways programs, which include all the key partners?
- What is the research evidence behind Skills to Pay the Bills?
- What is the research behind various interagency collaboration models?
- On the subject of health, could we find out more from Arkansas about their Medicaid buy-in program change in 2014, and whether more SSI individuals transitioned into the MBI from SSI?
- How can we track high-performing transition programs relative to employment or paid work experience outcomes?
- How can we track school internship programs that could be integrated to include students receiving SSI?
- Could we obtain more information on training American Job Centers to work with disabled individuals?

3. Ideas for further research and practice

- Examine how Career Pathways programs support youth employment and financial self-sufficiency.
- Conduct more research on what secondary schools are doing to move students into employment before they finish school.
- Look at Indicator 14 data to see which states reported the highest postsecondary outcome data (one way to look at high-performing states).
- Identify motivational services to get people engaged in employment services.
- Examine the impact of LTSS Medicaid portability.

D. Questions and comments posted during the meeting

- Any updates with field office training to embrace our youth at SSA offices?
- Research on pairing financial literacy programs for youth and families -- relevant to employment, education and benefits/finance.
- How can we impact the AJCs and ensure this population can be served effectively-- particularly given that many states are not able to take all youth who were on SSI prior to their age 18 redetermination.
- Employment: What role are informal supports playing? Many people don't get a large amount of support -- the role of informal and formal supports is important to understand.
- Employment: What do families need and how do we help families lay out high expectations related to employment?
- The NCC has data on the model demo programs.

- Agreed, the research does not disaggregate specifically for SSI youth with disabilities.
- Needs to go beyond just IDD at AJCs--non obvious disabilities such as ID are likely presenting themselves already but we need to make certain they are served better. And the perception, based on the NGA meeting last week I presented at for state workforce boards was that anyone on disability benefits was not considered part of the potential labor pool per a recent report by the Brookings Institute.
- I heard many suggestions to incorporate "families," but I think it's important to recognize that will not work in all cases and should not be a universal recommendation. Some youth (e.g., youth in foster care) may not have family members to include. Other youth may not have a healthy or trusting relationship with their biological family, but may trust other adult figures. I think it would be interesting to test the effectiveness of asking youth who they want to be included in the process, whether it's benefits counseling or something similar.

APPENDIX D. SUMMARY OF THIRD MEETING OF THE SSI YOUTH FORMATIVE RESEARCH PROJECT

The third meeting of the Community of Practice (CoP) on SSI Youth Recipient and Employment Transition Formative Research Project was held on Thursday, March 22, at 3 p.m., Eastern Daylight Time. The meeting explored *the characteristics of the target population, including the following subgroups*: (1) those at risk of re-entering SSI as adults, (2) those who could benefit from employment interventions, and (3) those at risk of receiving SSI. In particular, we hope to document the characteristics of youth who would most likely benefit from employment interventions. Defining the target population is critical if we are to define interventions that are more or less successful for youth, identify gaps in who is served, tailor programs to meet youth’s needs, and potentially identify subpopulations of youth. Thirty-seven CoP members, including the four affinity group liaisons, attended the meeting either live or through the on-demand option.

A. Meeting guide questions

Before the CoP meeting, we shared a meeting guide with all CoP members via email. This guide documented several resources and included key research questions for reflection. These questions were posted on SharePoint for members to respond. The cross-cutting questions are listed below.

- What are the key characteristics of youth SSI recipients?
- How might these characteristics differ among those youth who do have successful transitions compared to those who do not?
- What are the important geographic issues in serving this population?
- What are the particular challenges these characteristics present?
- How might access to programs differ for those under age 17 and those ages 18 to 24?

The questions specific to the affinity group are listed below.

1. Employment

- Which types of youth SSI recipients are more or less likely to use employment programs and employment supports?

2. Education

- What are the characteristics of youth SSI recipients who are more or less likely to graduate from high school?
- What are the characteristics of youth SSI recipients who access postsecondary education programs?

3. Health

- What characteristics of youth SSI recipients affect their connections to health supports?

4. Benefits and finances

- What characteristics of youth SSI recipients affect their involvement with benefits counseling and financial education?

5. System linkages

- What federal, state, and local programs might youth SSI recipients be involved with that could affect their participation in employment programs? How might these programs reflect different characteristics of youth SSI recipients?

B. Key discussion points

Key research questions intended to both generate discussion and document promising interventions and strategies that promote sustained, gainful employment for youth receiving SSI were posted on SharePoint. A summary from the SharePoint discussion, by affinity group, follows.

1. Employment

- Challenges faced by youth SSI recipients are less about their individual characteristics and more about the availability and quality of services that will expose them to work experiences.
  - Need to build the capacity of schools and employment services to deliver quality transition services.
  - Increase the expectations that family, educators, and service provider have about youth SSI recipients accessing competitive integrated employment.
- Youth SSI recipients as a whole have been underserved to date because they are harder to engage (PROMISE and YTD).
  - [From projects like PROMISE] we know that partners are successfully serving youth who have already come to the table or are easiest to serve. As a result, SSI youth are overlooked because they are harder to engage in services.
  - PROMISE (and other similar programs) provide a way to inform [the field of secondary transition] with respect to how we can better engage the SSI youth population and how we can deliver services in ways that work for them.
- Ideas to further explore
  - How to synthesize and integrated lessons learned from other programs that serve youth recipients of SSI into future projects and services.
  - How pre-ETS can better prepare youth recipients of SSI for employment by both establishing an expectation for work earlier and educating youth/families on the benefits of work (versus fear of losing benefits).
- Additional questions for the CoP
  - Should programs seek ways to target youth whom we know are less likely to use supports or who are less likely to be successful in moving from school to work?

2. Education

- Characteristics
  - Not likely to be challenged academically so that they can benefit the most from school or continue into post-secondary education or training.
  - Do not always have an IEP or 504 plan.
  - Likely to be on a career pathway during school with a transition plan and goals focused on employment as opposed to postsecondary education.
  - The majority have disabilities that are not obvious such as learning disabilities, autism/Asperger's disorder, or functioning autism.
  - Lack access to other transition activities beyond course credits for graduation puts them at a disadvantage for a successful transfer to a postsecondary setting.
- Maryland is seeing an increased number of students with ID accessing inclusive postsecondary transition programs (typically from age 18 to 21) and then beyond 21 for traditional postsecondary education programs on college campus. These youth need extensive access to work-based learning and educational supports to complete coursework.
- Minnesota developed a numeric goal for youth ages 19 to 21 with developmental cognitive disabilities who receive special education services to achieve competitive integrated employment.
  - Strong collaboration with vocational rehabilitation services and county supervisors/case managers to learn and use practices that will lead to improved outcomes.
  - Students with developmental cognitive disabilities participate in their career planning activities during high school.
  - Practices that are being implemented: Informed Choice Conversation, Informed Choice Tools, and Student Estimator sessions.
- Ideas to further explore
  - Identifying creative strategies, as part of transition planning, to offer students additional time (e.g., an additional year beyond four years or summers) to participate in community-integrated instruction and paid work experiences.
- Additional questions for the CoP
  - How do we engage more youth, and how do we target youth who are less likely to be served under the current system?

3. Health

- Characteristics
  - Poor health and lower quality of life.

  - Some conditions can be exacerbated, and in turn, limit the young person's ability to participate in employment activities.
  - Increase in mental health and global developmental disabilities.
- Youth with disabilities are at increased risk for poor health and quality-of-life outcomes when their disability status affects their socioeconomic standing.
- Research on disability and health care suggests that individuals with a disability face increased barriers to obtaining health care as a result of limited access, such as transportation issues, problems with communication, and lack of insurance (Drainoni et al. 2006).
- Ideas to further explore
  - The importance of integrated systems of care.
- Additional questions for CoP members
  - Do programs for youth SSI recipients need to account for or address specific health concerns if they are targeting certain youth (or all youth). If so, in what ways can they address those concerns?

4. Benefits and finances

- Characteristics
  - Harder to identify.
  - Not always enrolled in special education.
  - Harder to engage.
- Program staff need to be more aware of youth who might be more likely to fall through the cracks so that they can look for ways to include them.
- [From System Linkages discussion] Youth and families would benefit from financial education from the time a child is very young so that they and youth on SSI understand the impact of staying on SSI in contrast to being employed.
- Fear of losing benefits is a major challenge in moving youth recipients of SSI to work.
- [From Education discussion] Maryland schools have partnerships with regional benefits counseling organizations that assist the schools with the professional development of transition staff and family members as they build an understanding the balance between benefits and increased exposure to paid work and postsecondary education.
- Ideas to further explore
  - Professional development and/or partnerships between secondary education personnel and benefit counseling organizations so the former are better able to answer student/family questions about their fear of losing benefits by working.
  - Strategies to identify youth.
  - Strategies to engage youth.

- Additional questions for CoP members
  - Should programs target all youth or focus on specific youth?

5. System linkages

- Characteristics
  - Not likely to be exposed to possible careers throughout their youth.
  - Fear of losing SSI benefits and lack of knowledge about work-incentive programs.
  - Not expected to be economically self-sufficient as adults.
  - Lack of opportunities to access necessary transition support.
- What particular challenges do these characteristics present?
  - Low expectations.
  - Families become dependent on their SSI income.
  - Fear of losing the benefits.
  - Generational unemployment or underemployment (i.e., lack of working role models for youth).
  - Lack of strong support networks to open doors to career experiences and jobs.
  - Difficulty attending appointments due to lack of transportation.
  - Lack of knowledge to make informed choices and decisions.
  - Inconsistent knowledge of SSI benefits in SSA offices.
- Youth and families would benefit from financial education from the time the child is very young so that they and youth on SSI understand the impact of staying on SSI in contrast to being employed.
- Need to offer ongoing career exploration and work experiences.
- Too often we work to align structure instead of purpose; when purpose is shared across plans, it creates resources and aligns systems.
- Ideas to further explore
  - Access to pre-employment transition services as a way to offer opportunities for informed decisions and choices related to transitioning into post-secondary education, employment, and independent adulthood.
  - How to align all supporting systems toward one shared goal/purpose.
- Additional questions for CoP members
  - How do pre-employment transition services, particularly work-based learning experiences, affect expectations at the systems-level?

C. Recommendations for practice and research

After the CoP meeting, members were asked three survey questions: (1) what resonated with them [per the discussion]; (2) what questions do they still have; and (3) what ideas do they have for further research and practice? We received responses from three members, and we have since followed up with the other members. Responses to the questions thus far are as follows.

1. What resonated?

- Exploring the children and young adults with severe emotional disabilities who do not have cognitive or physical impairments but struggle greatly with mental health treatment and gainful employment. This is a particularly challenging population.
- Educating families and professionals together to increase knowledge on the leverage of benefits.
- Educating social security workers.
- Access to benefits planning as a standard.
- SSA should have better connection with schools to assist with the needs of SSI youth that are transitioning to adulthood.
- A designated youth specialist in the field offices will be helpful to serve youth that come to those fields offices.
- All field offices need to be better trained on policies like the 301 status and an understanding of what qualifies under 301.
- The need for a nationwide Disability Benefits 101, which is a state-tailored, web-based tool that provides information on health coverage, benefits, and employment.
- SSI is a pathway to employment.
- Getting waivers so that youth don’t have to report wages.
- If the target is the SSI youth population, then state programs need to work with SSA or their state Medicaid program to identify these youth and make sure these youth are accessing available services and supports.
- The SSI population as a whole has been underserved (not for eligibility reasons, but rather because services are not set up to address their more immediate needs and are not easily accessible due to poverty or disability related reasons).
- Excited to apply evaluation findings from the PROMISE project to the field.
- Early intervention with youth and families.
- Findings that are coming out of PROMISE work are applicable to all youth.

2. What questions do CoP members still have?

- How can we increase the understanding of SSI benefits, gainful and competitive employment, financial literacy, and similar issues among individuals with disabilities and their families who live in high poverty areas across the country?

- What will it take to secure dedicated funding for states to ensure that individuals with disabilities have access to quality benefits planning?
- How can we impact the long-term access to intermittent benefit eligibility in the event of high-wage earners having an interruption in employment?
- What efforts, if any, are underway with SSA to get waivers?
- Research has yet to identify sub-populations to target and reasons to target sub-populations of SSI youth.
- Why there is a need to identify subpopulations? Focusing on all SSI youth makes sense.
- Are the long-term outcomes for students with intellectual disabilities in university programs better, and what about those programs can be translated to a broader audience (since not all can go to college)?
- What is the best way to target this population to ensure services are provided as early as possible? The connection between SSA and school may be a start but not the only answer.
- What can be done to support the population of youth that may not be eligible for continued SSI at age 18 but do end up on the rolls down the road?
- What are the suggestions for connecting the youth who have “less obvious” disabilities with supports as they approach/are turning 18? What have we learning that we can tell people to do?

3. Ideas for further research and practice

- The issue of young adults with disabilities who live in rural areas and do not have access to reliable, affordable transportation to work are often re-enrolled for adult SSI benefits, not because they are not capable of competitive employment but because they cannot access it.
- Data being made available from the PROMISE grant outcomes.
- How to ensure transition services are designed in ways that work best for SSI youth. This can include engaging and meeting youth where they are at, learning that is individualized, hands-on, youth-led, interactive, and provided at times and places that work for the youth and their family. Additional learning methods could be one-on-one (coaching) and group interactive learning options.
- An intervention (maybe a demonstration to test an intervention(s) that targets the SSI youth that come off the rolls after age 18 determination and are most likely to end up back on the rolls later on.
- Interest in the Maryland program about educators being provided with professional development on benefit counseling.

D. Questions and comments posted during the meeting

- 90% of youth with SED are not in special education and don't have access to transition planning. In addition, when VR agencies connect with students primarily through special education, this 90% is not included - like any other youth on SSI who is not in the IEP/504 system.
- In Wisconsin Promise, 84% of youth have an IEP.
- Based on recent dialogues and feedback via our CaPROMISE project staff: we support youth and family, and we celebrate the benefits of knowing the rules/plans, good things for our youth to work and their benefits. Accessing the field office staff at SSI is a great frustration because of the timing and limited understanding of our issues for youth SEIE, 301, etc. . . . There is also a concern that long-distance families must go to a field office, and it can take up to 6 hours to navigate these offices.
- Not so much a question as a point: engaging youth in stipend paid work experiences (rather than wages) assists in the process of increasing interest levels in ‘going to work’—there are no effects to benefits because it is a stipend—and it allows youth to experience the perks of working. Youth are not signing themselves up for SSI/SSDI—these are generational and family-based fears—but the more excited youth become over work, the more they are going to push their parents to help them get involved in the world of work.
- Maybe via VR and ED Interagency Agreements to include all students with disabilities with or without an IEP or 504 plan to access pre-ETS.
- One way states can identify SSI youth is through their Medicaid program, as youth are eligible for Medicaid because they are on SSI. The state programs can the decide if they are willing to enter into a data sharing agreement to share this list to better target services and supports for this population.
- General question: do we have more high school districts that are becoming employment networks that would give them access to a benefits planner?
- Are we considering the youth who are not on SSI before age 18 but who apply for the first time at age 18 because family and the youth have the impression that it is their best option? They may need a similar but different type of information about their decision. I think often those individuals and families may view this as their only/last decision about work.
- Concerning access to Medicaid services, because Medicaid may be the only payer of certain services, there are some who believe that SSI is the only pathway to those services, but that may not be the case.

APPENDIX E. SUMMARY OF FOURTH MEETING OF THE SSI YOUTH FORMATIVE RESEARCH PROJECT

The fourth meeting of the Community of Practice (CoP) on Supplemental Security Income (SSI) Youth Recipient and Employment Transition Formative Research Project was held on Friday, April 27 at 2 p.m., EDT. The meeting examined what mix of research would be of highest value to the government. Thirty-three CoP members, including the four affinity group liaisons, attended the CoP meeting either live or on-demand.

A. Meeting guide questions

Before the meeting, we shared a guide with all CoP members via email. This meeting guide documented several resources and included key research questions for reflection, which were posted on SharePoint for members' consideration. The questions were:

- What research goals or outcomes should the government prioritize (such as building the capacity to deliver services to youth recipients of SSI or reducing dependency SSI for transition age youth)?
- What specific new interventions or strategies should be developed and evaluated? What existing interventions should be modified and evaluated?
- What promising interventions or practices (that are widely used) need to be further rigorously tested to determine if they produce beneficial impact on outcomes for youth who are recipients of SSI?
  - Who is the target population or sample to test these interventions?
  - What are the service capacity considerations to deliver interventions?

B. Key discussion points

Key research questions to generate discussion and document what mix of research would be of highest value to the government to promote sustained, gainful employment for youth receiving SSI were posted on SharePoint. A summary from the SharePoint discussion, by research question, follows:

1. What research goals or outcomes should the government prioritize?

- Programs that emphasize competitive, integrated employment, not only as an outcome but as an intervention:
  - Employment can help reduce poverty.
  - Employment can lead to important social outcomes for young adults such as greater inclusion.
  - Work itself provides a tremendous transformation. Providing a competitive, integrated job gives youth the opportunity to learn about work. This paid work experience is important for youth to have prior to exiting high school.

  - Work experiences allow employers to see youths' abilities and value as an employee. There is a need to focus on quality of placements in terms of skilled, in-demand jobs rather than just hours and wages.
  - Demand-side incentives are needed to build business capacity and opportunities for job seekers.
  - Explore creative ways to provide benefits counseling and financial education that help build better decision making and practical skill sets and that show the benefits of work.
- Building the capacity of individuals, families, and service systems:
  - Build the capacity of families to encourage and support independence at critical stages in youth development and link family capacity to important community resources.
  - Consider how to develop a systematic flow of services across agencies that provide well-defined services for transition youth.
  - Explore cross training between Local Educations Agencies (LEAs), DOR, Intellectual and Developmental Disabilities (IDD/DD) systems, the Social Security Administration (SSA), PSA and collaborate information/data and trainings for the youth and their family.
- Rigorously test and expand on interventions that have a proven impact. These interventions could include work experience and paid work; financial education and benefits counseling; case management to address family support and expectations, and youth empowerment; and collaboration among various systems that address youth, disability, and poverty.
  - When examining the effectiveness of the predictors for post-school success, SSI participation should be included as a data element.
- Access to Career and Technical Education (CTE) opportunities for youth with disabilities:
  - Examine methods local school systems offer CTE courses or bundle them in a credential that is recognized in the workplace.
  - When evaluating these programs, SSI could be a variable to understand how specific programs/interventions impact outcomes on youth who participate in SSI.
  - Provide career training as an early intervention, which could be tied to age 14 transition planning.
  - Post-secondary education, along with the CTE, is a pathway to competitive integrated employment.
- Ideas to further explore:
  - How many of these strategies have evidence-based research in non-SSI settings? What are other evidence-based interventions for individuals with similar barriers, such as low income and poverty, that can be learned from and applied to this population?

  - How do employment outcomes for youth recipients of SSI correlate to the types of family assets?
  - Starting employment services at age 14 along with transition planning. This intervention is evidence-based and has shown success in connecting youth to employment preparation processes earlier. The duration and the type of service could be examined.
  - Examining clusters of youth SSI recipients, such as whether they live in the same area.
- Question I still have:
  - Are there community-based interventions that work (as opposed to individual interventions), such as MD PROMISE and community conversation in Wisconsin?

2. What specific new interventions or strategies should be developed and evaluated? What existing interventions should be modified and evaluated?

- Interventions that focus on the family unit:
  - We know family involvement is a key predicator of post-school success, yet we still struggle on how to engage families of youth who are recipients of SSI in the transition planning process.
  - Execute the PROMISE, Family Employment Awareness Training model.
  - Measure families' expectations for their child's future using an assessment. Provide services to increase knowledge and learning regarding expectations, capabilities, and benefits. Conduct a post-assessment.
- Develop interventions that focus on the benefits of work:
  - Youth under age 18 need more support in understanding employment and its impact on benefits, such as Section 301.There is a need to deliver benefits counseling in a way that is digestible for young people and their families.
  - Bridge the research between what works for youth with disabilities and what works for youth in poverty. (From a poverty perspective, the goal is often getting people onto SSI as a means of expanding family income. How this message is framed and perpetuated needs to be examined.)
  - Develop and test financial literacy models for SSI youth to create a concept of budgeting and the need for employment.
  - Apply the CareerACCESS model generated by the National Council on Independent Living (NCIL), Policy Works, and the World Institute on Disability (WID).
- Create a new Ticket-to-Work process that provides a ticket for youth under 18 and receiving SSI.
- Ideas to further explore:
  - Development of a more consistent message among all systems serving youth who receive SSI.

  - Examine the role of schools. They have the most contact with transition-age youth and their families but often are not prepared to provide necessary services to youth on SSI. Schools often are not aware if student is receiving SSI.
  - Partner with businesses to develop career pathways (for example, the VA model).

3. **What promising interventions or practices (that are widely used) need to be further rigorously tested to determine if they produce beneficial impact on outcomes for youth who are recipients of SSI?**

- Collaboration among various impactful systems such as education, VR, workforce, DD):
  - Despite the message, and even legislation to encourage collaboration, different agencies cannot, do not, or will not work together.
  - Systems do not understand each other's language services.
  - Examine whether there can be a position(s) where someone understands all systems and services and can build the relationships with the silos to further benefit youth on SSI.
  - Extend the six PROMISE states/grants as models that work.
    - o Replicate the models in other states as a model of youth/family engagement and collaboration across agencies/services, not as a research project. This could result in reducing the dependence on SSA and moving out of poverty.
  - Youth apprenticeship and Project SEARCH should be tested further.
  - Evaluate if training local SSA employees who talk with youth and young adults receiving Social Security benefits that youth with disabilities can be successful. Also, provide SSA employees with a better understanding of the work incentives available to individuals who want to work.
- Test interventions that use business settings and offer youth internships before exiting school (for example, Project SEARCH).
  - Examine a project to determine which service interventions lead to successful outcomes.
- Evaluate models that help students access career or technical education and other credential programs that result in long, self-sustaining employment.
- Refine and test benefits counseling intervention needs.
- Provide qualitative examination of family engagement.
- What is the efficacy of the most common practices within high school and transition-age youth age 18 to 20?
- Ideas to further explore:
  - Further examine the effectiveness of ongoing practices. There is a need to test projects because the field seems to implement practices that don't work that well.

  - Develop a research agenda that is broader than just those who touch government-funded programs:
    - Examine similar research that might exist that serves other populations.
    - In Arkansas, there is an overlap of youth that were also involved with Medicaid and juvenile justice and foster care.
- Question I still have:
  - Are there ways to simplify the rules for the youth and family to make the system more navigable?

C. Recommendations for practice and research

After the CoP meeting, members responded to three survey questions: (1) what resonated with you [per the discussion]? (2) what questions remain? and 3) what ideas do you have for further research and practice. Responses to these questions follow:

1. Ideas for further research and practice

- Ways to leverage supports and services across systems, including workforce, VR, DD, behavioral health, independent living, and community colleges, among others.
- Regarding the lack of general knowledge of providers and organizations on work incentives, resources are being spent on training benefit counselors. Use funding to provide general training to all providers through online tools such as Disability Benefits 101 (www.db101.org). DB101 provides information to debunk myths, promotes employment, and provides information and resources without a provider, individual, their families, and circle of support having to learn a completely new skill set.
- What are the needs of the business community? How do we engage businesses to get youth into competitive, integrated employment?
- For further exploration of the importance of employment, additional research is needed to determine the value of competitive employment as compared to stipend work and the long-term effects.

Explore research on aligning messaging from providers.

2. Questions CoP members still have

- Why focus so much on systems when many youth on SSI do not receive formal services?
- Why focus on high-school aged youth when employment discussion and expectations should start in elementary school, like it does for children without disabilities?
- What is the role of the inclusive higher education movement on competitive integrated employment?

3. What resonated?

- Connect more youth to career pathways programs, which exist in every state, and the inclusive career pathways projects funded by the Rehabilitations Services

Administration (RSA) and the Office of Disability Employment Policy (ODEP). This is worth further exploration.

- Work with communities to encourage and support employment. One example is the Faith at Work program.
- Start employment services at a younger age.
- Change the employers' conversation from accommodations to a more diversified workforce with system adjustments that lead to more effective employment outcomes.
- The inclusiveness of all stakeholders, including schools, to better prepare youth on SSI for employment. The preparation may include soft skills development and any quality to meet the business needs.
- Complexity of going to work for youth on SSI. It must be simpler!
- Thinking about the drastic change families go through in moving from education to the community. How do we encourage more research about community interventions?
- Industry engagement.
- Incentives for work-based learning that is a collaborative effort—parents, school, employer, and student.

D. Questions and comments posted during the meeting

- Postsecondary education is also a pathway to CIE along with CTE.
- How many of these strategies have an evidence-base in non-SSI settings? Are there evidence-based interventions for individuals with similar barriers (low income, poverty) that can be learned and applied to this population? Is there a good lit review on that?
- Youth apprenticeship is growing as a work based learning option for in-school students. It is with a company who has an apprenticeship program and in Virginia, the school, parents, CTE Director, company, and student agrees on the tasks. It has proven to be very effective.
- Are there modifications or accommodations that some or many youth will need to participate? Is this a substantial issue in numbers?
- There should be connection to the national and state 2gen efforts.
- It might be interesting to look at SSI youth who access services in the workforce system and through Career Pathways programs. Workforce agencies and their partners are engaged in improving their implementation of Equal Opportunity provisions of WIOA so that they better include youth and adults with disabilities -- and are required to report disaggregated disability data. And youth services in the workforce system under WIOA require financial education – so it's an opportunity to leverage the resources of the workforce system.
- Incentives to companies and industry associations to encourage work based learning, from shadowing to apprenticeship, for individuals with disabilities.

APPENDIX F. SUMMARY OF FIFTH MEETING OF THE SSI YOUTH FORMATIVE RESEARCH PROJECT

At the fifth meeting of the Community of Practice (CoP) on Supplemental Security Income (SSI) Youth Recipient and Employment Transition Formative Research Project, organized to seek additional recommendations for developing future priorities, participants continued to offer input. Their suggestions and observations will help establish what mix of research will be of greatest value to the government in the years ahead. Twenty-seven CoP members attended the meeting, held on May 24, 2018.

A. Meeting guide questions

Before the meeting, we shared with all CoP members a meeting guide that documented several resources and included key research questions for reflection. We also posted the document on SharePoint for members' consideration and comment. The questions were:

- What promising interventions or practices (that are widely used) need to be further rigorously tested to determine if they produce beneficial impact on outcomes for youth who are recipients of SSI?
  - Who is the target population or sample to test these interventions?
  - What are the service capacity considerations to deliver interventions?
- In your opinion, what are some of the barriers for bringing effective practices to scale?
- What is one item that may have the most implications for further action?

B. Key discussion points

The key research questions aimed at generating discussion among the CoP members focused on interventions or strategies that should be further evaluated to promote sustained, gainful employment for youth who receive SSI. A summary of the key issues and points raised and questions asked on the SharePoint site and during the meeting discussion follows.

1. What specific new interventions or strategies should be developed and evaluated?

- Focusing on targeting local areas could be useful. If people are getting a lot of their (often incorrect) information about SSI and other services from family, friends, and other local resources, interventions at the community level could prove beneficial.
- It would be an issue to find all the right local partners to work with and finding the right counterfactual local areas.
- Research could establish if training local and federal SSA employees who talk with youth and young adults who receive Social Security benefits that youth with disabilities can work, and whether a better understanding of work incentives available to individuals who want to/do work is valuable. It could also establish whether youth received the message that they can work from SSA.
- Examine starting benefits planning earlier in the youth's life and offering more resources to youth and families.

- To what extent do you think this is related to SSA moving the work function out of the field office and into specialized AWIC functions and WIPAs?
- Future studies should address the issue of health insurance coverage more directly.
- Family-centered approach has proven the most powerful.
- Starting earlier to identify who is on SSI.
- Test whether leading with financial education is more appealing to many families rather than starting with benefits counseling (which can be invasive to families).
- Test a curriculum or other strategy that measures and improves the ability of the social services world (TANF, SNAP, foster care, youth in danger of foster care, and so on) to encourage and support engagement in IEP, transition planning, pre ETS, post-school linkages, and so on.
- Examine the impact of employment outcomes if the job seeker has one employment plan across all the system (for example, various partnering agencies, including education, vocational rehabilitation, and so on).
- Examine the impact of the having an expectation and exposure to work at an earlier age (prior to age 14).
- Conduct a randomized control trial on youth and families who receive training on benefit planning.
- Integrate benefits counseling into the larger structure of financial literacy. The combined effort creates a community of support that expedites successes, but also provides multiple touch points to keep individuals and families engaged.
- Five- and six-year transition programs for students pursuing a diploma paired with real work or access with outcomes to career and technology programs.
- Engage youth as young as possible across medical, school, and adult services.
- Consumer engagement, family engagement, employer engagement.

2. What are the barriers for bringing effective practices to scale?

- People are choosing to remain underemployed to maintain their medical benefits.
- Financial and benefit support services are not adequate to truly support a "graduation" off benefits in a thoughtful manner.
- People with disabilities are not fully engaged in services because they don't see a positive outcome.
- Not knowing which students are receiving SSI. Schools, in particular, don't have that information, and given that engagement is a challenge with at least a good portion of the SSI population, they are not likely to be engaged with VR or other partners.
- Professionals must be in place for those who are advancing in employment and rely on their waiver and SS to support their growth in employment.
- Lack of collaboration for all partners in the transition system.

- Staff capacity and resources.
- Lack of patience to conduct the research at the practitioner level. If things don't work quickly, they get tossed aside for something else. We will never know if it works if it is not implemented long enough -- long-term studies are necessary.
- Data collection – consider evaluating data that schools and other partners already collect.
- Complicated intervention structures and adhering to fidelity of the intervention – keep it simple.
- Consistency with scale is always an issue. Specific agreement on the necessary components of benefits counseling and financial literacy is needed.
- Attitudes.
- Infrastructures within system and how professionals interact and collaborate with each other.
- Messaging (working in silos).

3. What is one item that may have the most implications for further action?

- Changing attitudes.
- Real work while student is still in high school.
- Educating the community on available services.
- Research that includes mixed methods (qualitative and quantitative). We need the hard statistical data.
- Studies funded across multiple federal departments.
- Larger scale and longer studies on work-based learning, knowledge translation, and attitudinal shifts.
- What is the tipping point by which SSA will actually implement new policy? We have data on intervention that does get results, but SSA doesn't seem to make policy changes based on those results. If we're not going to have a measure by which SSA changes programmatic policy, what are we actually doing?

4. Ideas to explore further

- Case management as it relates to transition planning.
- Financial and benefits planning for youth and their family.
- Parent training and information.
- Explore cross training between LEAs, DOR, IDD/DD system, EDD, SSA, PSA; data sharing across agencies. What is the message these professionals need to share with youth and families? How do we get the right information in their hands?
- Start transition planning and career exploration earlier — in middle school.

- Explore housing as part of the service delivery since it is a primary source of financial issues.
- Models of family engagement.
- Customer research and feedback on materials and services provided under benefits counseling.
- Strategies for SSA staff to consistently and accurately share information with families.
- Change messaging: working with the same staff members to change their message so that they are supporting families onto SSI.
- Personnel preparation programs at IHES for educators (for example, transition coordinators, teachers, and administrative personnel) and VR counselors.
- Correlational research on the positive impact of CTE — disaggregated by disability or disability label.
- Expect employment as a service offered to special education students while they are still in high school.
- Benefit counseling being part of larger financial literacy curriculum; there is currently no research base on this topic.

5. Questions I still have

- How do we scale up Disability Benefits 101? (currently in only nine states)
- To what extent do youth with disabilities in foster care take advantage of ABLE accounts? Specifically, can some portion of the foster care payment be diverted to an ABLE account so that the youth has a cushion when he or she exits foster care? (Also, in case it isn't widely known, youth exiting foster care can apply for SSI 180 days prior to their exit to help smooth that transition.)
- What does a systematic process for benefits planning look like? Is it offered through education? What information is provided to families, youth, educators, and others?
- How is self-determination part of the messaging? How do we give young people with disabilities the confidence to believe they can work?
- What are promising interventions for employers who have staff dedicated to diversity/disability?

C. Recommendations for practice and research

After the CoP meeting, members responded to three questions. These questions were the same questions we posed during the meeting:

1. What promising interventions or practices (that are widely used) need to be rigorously tested to determine if they produce consistent, beneficial outcomes for youth who are recipients of SSI?

- In your opinion, what are some of the barriers for bringing effective practices to scale?

- What is one item that may have the most implications for further action? Responses to the questions are included in the summary above.

D. Questions and comments posted during the meeting

During the meeting, CoP members posted questions and comments via On24 (the webinar platform). These comments and questions are listed below.

- Issues and practices associated with benefits counseling should be pushed into schools. Secondary teachers and even transition coordinators know little about this option or topic.
- I recently presented at the APHSA Health Summit, comprised of social services—foster care, TANF, SNAP professionals—and one of the things they raised and agreed on was the need for better consistency/accuracy/quality in information provided by SSA local staff.
- I am wondering, too, if there are interventions, practices, or a systematic process that can support teachers in helping families and students understand benefits and planning prior to high school graduation.
- Pursuing five- and six-year plans for students pursuing a diploma with access to WBL, CTE, and employment? We are seeing that as a struggle for students with little wiggle room in their schedules to manage courses and have other opportunities that are needed for many of our students. I would like to see this intervention targeted to students who may not be eligible for services and supports through VR or DDA.
- One of the great things about return to work, benefits counseling, and SSI is the fact that almost no one is ever adversely affected by work, particularly when it is students in transition. That is an easy concept to grasp for parents as well as families.
- Research regarding practices/interventions that address gaps in services and other issues experienced/related to individuals with non-obvious disabilities.
- Housing and related costs was a consistent issue/barrier experienced and should be considered/included in any further research efforts.
- We need strategies for youth without families — foster care, child welfare, and so on.
- Staff capacity and resources are major barriers.
- The need for benefits planning that includes the impact on an individual's access to ID/DD Medicaid Waiver services is needed.
- Within education, a barrier of infrastructure and staffing within schools is becoming more apparent as there is a greater focus on secondary transition.
- I agree that regional SSA offices need to be accessible and validated in the same way that regional offices from VR and Developmental Disabilities Administration are used.
- Is there a good way to have a student and his or her family, if appropriate, become an ongoing customer? Hearing information once or just the benefits analysis done may not be enough. I think research around supporting the youth as an ongoing customer would be good, following them closely through employment starts and retention. Perhaps a good online solution of info each month could work for some.

- There is a need for resources to encourage/allow for more innovation.
- Biggest barrier is schools don't know who the kids on SSI are.
- Real work in community settings leading to paid employment.

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