

**The Social Security
Administration's Youth
Transition Demonstration
Projects: Implementation
Lessons from the Original
Projects**

February 22, 2010

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GLOSSARY OF ACRONYMS

| | |
|---------|---|
| BOCES | Erie 1 Board of Cooperative Educational Services - the organization that administers the Erie County, New York, YTD project |
| BPAO | Benefits Planning, Assistance, and Outreach |
| CDB | Childhood Disability Benefits - Title II disability benefits |
| CDOE | California Department of Education |
| CDOR | California Department of Rehabilitation |
| CDR | Continuing Disability Review |
| CUNY | City University of New York - the organization that administers the Bronx, New York, YTD project |
| CWP | Colorado WIN Partners - the organization that administers the Colorado YTD project |
| CYW | Colorado Youth WINS - the Colorado YTD project |
| DDD | (Colorado) Division of Developmental Disabilities |
| DORS | (Maryland) Division of Rehabilitation Services |
| DPN | Disability Program Navigator - title of service provider staff at the Colorado YTD project |
| DVR | Division of Vocational Rehabilitation |
| EIE | Earned Income Exclusion |
| IDA | Individual Development Account |
| IDEA | Individuals with Disabilities Education Act |
| IEP | Individualized Education Program |
| I-Teams | Independence Teams - teams of service provider staff located at each of the four sites for the Colorado YTD project |
| MSDE | Maryland State Department of Education |
| MYTI | Mississippi Youth Transition Innovations - the Mississippi YTD project |
| NLS | Neighborhood Legal Services, Inc. - a partner organization in the Erie County, New York, YTD project that offers legal services to low-income people and people with disabilities |
| OMB | Office of Management and Budget |
| PASS | Plan for Achieving Self-Support |
| RFA | Request for Applications |
| SEIE | Student Earned Income Exclusion |
| SSA | Social Security Administration |
| SSDI | Social Security Disability Insurance - Title II disability benefits |

| | |
|------|---|
| SSI | Supplemental Security Income; - Title XVI disability benefits |
| TPP | Transition Project Partnership |
| TW | Transition WORKS - the Erie County, New York, YTD project |
| WAI | WorkAbility I |
| WIA | Workforce Investment Act |
| YTD | Youth Transition Demonstration |
| YTDP | Youth Transition Demonstration Project - the CUNY YTD project |

EXECUTIVE SUMMARY

The Social Security Administration (SSA) is conducting the Youth Transition Demonstration (YTD) as part of a broader initiative to encourage disability beneficiaries to return to work. The demonstration provides youth ages 14 through 25 with employment-related services and waivers of certain rules governing the Supplemental Security Income and Social Security Disability Insurance programs, including childhood disability benefits. The waivers augment existing financial incentives for beneficiaries to work.

Originally, SSA selected seven organizations to develop and implement YTD projects through a Request for Applications in 2003. Subsequently, SSA contracted with a Mathematica-led team, which included MDRC and TransCen, Inc., to conduct a multi-site evaluation of YTD based on an experimental research design. Six projects, including three of the original seven, are participating in this evaluation.

Mathematica was contracted to conduct an evaluation of the YTD projects. The evaluation includes a process analysis of the implementation of the seven original projects; this report focuses on those implementation experiences. For the three projects that were subsequently selected into the random assignment evaluation, the analysis is limited to their pre-random assignment, or pilot, experiences. For the remaining four, information from the full period of program operations is included.

The seven original YTD projects were:

- Bridges to Self-Sufficiency (California)
- Colorado Youth WINS (Colorado)
- Transition WORKS (Erie County, New York)
- Smart Start (Iowa)
- Project Transition (Maryland)
- Mississippi Youth Transition Innovation (Mississippi)
- The Youth Transition Demonstration Project of the City University of New York (Bronx County, New York)

Each of the YTD projects shared common goals of improved educational and employment outcomes and reduced reliance on disability benefits for participating youth. The interventions offered a range of return-to-work supports including case management, supported employment, and benefits counseling. However, they featured a widely varied range of service delivery approaches and program components. In addition, there was diversity among the projects in terms of geographic scope, number of participants, type of lead organization, and staffing structure. This diversity provided an opportunity to explore some of the factors that lead to successful program implementation. That exploration was the basis for this report.

Based on information obtained through interactions with the seven original YTD projects, as well as a review of early project documents, six lessons emerged that may help policymakers and administrators develop, fund, and provide interventions for youth with disabilities who are making the transition from school to adulthood. Those lessons are:

1. **Strong partnerships are instrumental to successfully serving youth in transition.** The presence of effective partnerships facilitates the delivery of services as intended, but fractures in such partnerships can lead to miscommunication and inconsistent service delivery to program participants.
2. **Bold initiatives to bring about systems change entail high risk.** Attempts to blend funding into a single source require a high level of cooperation and buy-in among many different agencies that may have competing goals. Though highly appealing in principle, such approaches may be overly ambitious within a limited timeframe and without significant support across all funding agencies.
3. **There are advantages and limitations to operating youth programs on a small scale.** Transition programs that choose to serve relatively small numbers of youth are better equipped to provide services to those who have high service needs. They can also more easily adapt to significant changes in the service environment. However, such programs will inevitably cost more to operate per participant, may be difficult to “scale up,” and will only be able to serve a small proportion of the target population.
4. **Getting to scale often entails operating the same program in multiple, highly dispersed locations with different service environments, economic conditions, and population demographics. Such geographic dispersion can be successfully managed.** Having a strong project director, an effective management structure, and good communication mechanisms are key to successfully managing multiple project sites.
5. **To ensure a consistent focus on program goals, intervention components should be clearly defined and linked to measurable outcomes that are monitored.** To help ensure successful program implementation, key stakeholders and project staff should be given a clear sense of what and how outcomes will be tracked. They should also be informed about the importance of monitoring associated benchmarks as well as how to monitor these benchmarks. Such ongoing internal evaluation facilitates the project’s ability to demonstrate its success to potential participants, funders, and other key stakeholders.
6. **Providing support services such as case management and benefits planning in the absence of the direct provision of employment services is unlikely to yield positive outcomes.** An approach that provides support services, including case management and benefits planning and advisement, coupled with proactive employment services, such as job development and placement, may provide youth with the skills and experience that they need to become self-sufficient.

These lessons are operational in nature and are organized around best program practices. They are not intended to suggest which of the original YTD projects were most effective or had positive impacts on the transition outcomes of participating youth. Subsequent reports under this study will present findings that will speak to these issues, based on analyses of the six projects participating in the random assignment evaluation.

I. INTRODUCTION

The Social Security Administration (SSA) is conducting the Youth Transition Demonstration (YTD) as part of a broader initiative to encourage disability beneficiaries to return to work. The demonstration provides youth ages 14 through 25 with employment-related services and waivers of certain rules governing the Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) programs, including Childhood Disability Benefits (CDB). The waivers augment existing financial incentives in those programs for beneficiaries to work.

YTD has been implemented in ten locations across the country with funding provided by SSA to universities, state agencies, and nonprofit corporations. These organizations (awardees) were selected in two phases to design and operate YTD projects. The first group, chosen in September 2003, consists of seven organizations in six states: California, Colorado, Iowa, Maryland, Mississippi, and New York (two organizations). The second group was chosen in November 2007 and consists of three organizations located in Florida, Maryland, and West Virginia. As of this writing, YTD projects in six of the ten sites are no longer operating under SSA funding, while projects in the remaining four sites are expected to continue operating under SSA funding for periods ranging from several months to two and a half years.

This report focuses on the seven original YTD projects selected for funding in 2003. Three of the original seven projects were selected for a national random assignment evaluation in 2005; however, this report only focuses on program operations prior to joining the random assignment evaluation for the three projects and all operations for the remaining four original projects. The seven original projects have been in existence for up to six years, during which they have accumulated a rich history that includes both notable achievements and disappointments. Based on our compilation and analysis of that history, we have identified a number of lessons regarding the design and implementation of employment-focused interventions for youth with disabilities. The presentation of these lessons constitutes the core of this report.

A. The Development of the Youth Transition Demonstration

The SSA selected the seven original organizations to develop and implement YTD projects. This section discusses the agency's goals for those projects and the process it used to select them. To set the stage for that discussion, the section begins by identifying the legal authority under which SSA initiated YTD. It concludes with a discussion of the cooperative agreements awarded to the original projects.

1. The SSA's Demonstration Authority

The SSA initiated YTD under the authority of sections 234 and 1110 of the Social Security Act of 1935, as amended in 1980 by Public Law 96-265. The 1980 amendments to the act provide SSA with the authority to conduct demonstration projects to test the effectiveness of return-to-work initiatives for Title II (SSDI and CDB) and Title XVI (SSI) disability beneficiaries. Under this authority, SSA may temporarily waive certain rules governing disability program eligibility and benefit levels to provide incentives for beneficiaries to re-enter the workforce. The SSA's Title II demonstration authority is subject to periodic congressional review and renewal, whereas its Title XVI demonstration authority is permanent. YTD involves SSDI, CDB, and SSI beneficiaries, and therefore was initiated under both the Title II and the Title XVI demonstration authorities. For YTD, the relevant renewal of SSA's Title II demonstration authority occurred in 1999.

2. Rationale for YTD

An intervention to promote employment among youth with disabilities has great potential to improve disability policy because of the large target population, the promising prospects for improving employment outcomes, and the substantial benefit costs that could be averted through better employment outcomes. In December 2007, there were approximately 721,000 SSI beneficiaries ages 13 through 21 and 134,000 SSDI or CDB beneficiaries ages 18 through 24. These youth are less likely than adults with disabilities to be fully entrenched in dependency on benefits. Youth may willingly consider employment options because most of their nondisabled peers are either working or preparing to work. Furthermore, the lifetime advantage of work over dependency may be high for these youth because they have many potential working years ahead of them. This provides youth with a potentially large financial incentive to pursue employment. While employment could be rewarding for the youth, it could also be advantageous for SSA and for taxpayers. Rupp and Scott (1996) estimate that youth who begin receiving SSI before their 18th birthday spend an average of nearly 27 years on the disability rolls over their lifetimes. The present value of 27 years of federal SSI benefits at the 2009 monthly payment level of \$674 is approximately \$150,000.¹ This is a rough estimate of the SSA benefit costs that could be averted if an intervention such as YTD diverted one youth from a lifetime of dependency.

3. Cooperative Agreements to Implement the Original YTD Projects

Acting under its Title II and Title XVI demonstration authority, in June 2003, SSA released a request for applications (RFA) from state agencies to implement YTD projects designed to improve transitions from school to work and independent living for young people with disabilities. The SSA hoped to accomplish this through a number of means: interagency partnerships that integrated services and support strategies and blended resources; offering waivers to SSA program rules; and through providing individualized, evidence-based transition services that maximize consumer choice and control over employment goals and service arrangements. Furthermore, the RFA specified the YTD target population to be youth who were receiving SSI, SSDI, or CDB or would be eligible to receive these benefits in the future. They further reported that SSA expected most of the target youth would be between ages 14 through 25. From the applications received, SSA awarded cooperative agreements on September 30, 2003 to seven public universities or state agencies. The SSA funded these seven YTD projects at a level of approximately \$680,000 annually per project for up to five years.

The terms of the cooperative agreements required the awardees to collaborate closely with SSA and with contractors designated by SSA on the design, implementation, and evaluation of the YTD projects. The SSA staff managing the YTD initiative were active in many aspects of the demonstration and were consulted by the awardees on matters such as the development of service strategies, the hiring of personnel, the release of public information materials, and the development of data systems for managing and evaluating the projects. In 2004, SSA contracted with Virginia Commonwealth University to provide technical assistance on program design and implementation to the YTD sites.

¹The present value calculation is based on 27 years of benefit payments at \$674 per month and a discount rate of 3 percent.

B. Common Features of the Original YTD Projects

The original YTD projects targeted youth ages 14 through 25 (or a subset of this age group) who were receiving, or were eligible to receive SSI, SSDI, or CDB.² While each project had a unique intervention, they shared the goals of improved educational and employment outcomes and reduced reliance on disability benefits. Broadly speaking, the key mechanism for helping youth with disabilities to achieve these goals was case management, which included counseling about SSA benefits and the YTD waivers and coordination of services from multiple providers. All of the projects included dedicated staff who worked directly with participants to advise them on their benefits and encourage them to use services designed to improve their educational and employment outcomes.

The following specific features of YTD interventions were common to all or most of the original projects:

- **SSA Waivers for YTD.** Five alternative SSI program rules that apply to YTD participants were adopted by all of the original projects.
- **Benefits Counseling.** All of the projects had staff who provided participating youth and their families with counseling on SSA disability benefits, use of the waivers, and the implications of employment for disability program eligibility and benefit levels.
- **Person-Centered Planning.** Intensive staff interaction with participating youth was a common feature of the original YTD projects. This helped them to identify short- and long-term educational, employment, and life goals and to develop an achievement plan.
- **Career Counseling.** All of the original YTD projects offered participants counseling on careers consistent with their interests and goals. The projects varied depending on whether that counseling was accompanied by job placement and other work-based experiences.
- **Family Counseling/Involvement.** Recognizing that concerns by parents and other family members can be a barrier to transition to employment and greater independence by youth with disabilities, the original YTD projects reached out to family members and included them in many project activities, most notably counseling about SSA benefits and waivers.
- **Coordination of Services.** The original projects provided their participants with assistance in navigating the networks of school-based and adult services so that they could obtain integrated packages of services that were responsive to their individual needs.

C. The National YTD Evaluation

The national evaluation included work with all seven original sites, though only three of the seven participated in the random assignment component of the evaluation. This section describes

²The YTD project in Mississippi was the only one that served youth under age 14. Its target population ranged in age from 10 to 25 years.

the development of the national evaluation, including selection of a national evaluator for YTD in September 2005 and the refinements to the initiative that were implemented around that time. It concludes with detail on the national evaluation.

1. Assessment of the Potential for Rigorous Evaluation

Beginning in December 2003, MDRC conducted phone interviews and site visits with management and staff from each of the seven original YTD projects. The purpose of the assessment was to determine the feasibility of conducting a national random assignment evaluation of YTD and explore each project's appropriateness for and interest in such an evaluation. In its final report, MDRC concluded that a subset of the original YTD projects might be a good fit with a random assignment evaluation based on (1) the strength of the interventions relative to existing services, (2) the interest of project management in participating in a random assignment evaluation, (3) the compatibility of the intervention designs with random assignment, and (4) the potential within each project to enroll enough youth in the evaluation for the planned statistical analysis to have sufficient power to detect reasonably-sized impacts (Butler et al. 2004).

2. Selection of the National Evaluator

In 2005, Mathematica Policy Research, along with its subcontractor MDRC, was awarded a contract by SSA to design and implement a rigorous national evaluation of YTD services.³ Using the information gathered during MDRC's original reconnaissance work as a foundation, site visits were conducted to each of the original projects to both reassess the interest in and the feasibility of participation in a random assignment evaluation. Based on these visits and subsequent discussions, the evaluation team, in conjunction with SSA, selected three of the original projects—the Colorado and two New York state projects—to participate in the random assignment component of the national evaluation. These projects entered the national random assignment evaluation in 2006. The YTD evaluation team, in conjunction with SSA, selected six strong organizations or existing projects to be part of the YTD national impact study.

3. Heightened Emphasis on Employment Services

An early task in the national evaluation was to develop a knowledge base related to youth transition. Through an extensive literature review and consultation with national experts, a conceptual framework was developed to help understand the role YTD projects might play in guiding youth towards successful transition outcomes. This framework specified core services, of which employment services were considered to be most critical. However, many of the YTD projects as originally designed were intended to bridge gaps or help youth navigate existing services and systems, rather than provide direct employment services to participating youth. To ensure a strong focus on employment, all sites participating in the national evaluation were required to adopt the provision of direct employment services as a core component of YTD services; this requirement was articulated in the memorandum of understanding between project sites and Mathematica.

³ MDRC's principal roles in the evaluation were to lead the site reconnaissance and recruitment task and to lead the process analysis.

4. Consolidation of Technical Assistance and Evaluation Activities

As noted in an earlier section, Virginia Commonwealth University was awarded a contract in 2004 to provide technical assistance to the original YTD projects. In 2006, SSA consolidated all YTD technical assistance and evaluation related activities into the Mathematica contract. TransCen, Inc., a nationally recognized organization specializing in developing and implementing employment-focused programs for people with disabilities, was selected to be the technical assistance provider, under subcontract to Mathematica. TransCen technical assistance liaisons were assigned to work with each YTD project.

5. Site Visits to the Original YTD Projects

In order to document the experiences of each of the seven original YTD projects, at least two field visits were conducted by researchers from the national evaluation team. During these visits, researchers met with program management and staff to gain a clearer understanding of the successes and challenges of implementing the interventions. When possible, individuals involved with the design and implementation of the original interventions also participated in discussions. Information gathered during these visits, along with background documents and information gathered during subsequent contacts with the projects, comprise the data sources available to inform this study of the original projects. It should be noted, however, that a comprehensive process analysis of the original sites was not conducted.

6. Overview of the National Evaluation

The SSA recognized that widespread adoption of the YTD model in the future will require buy-in by diverse funders, service providers, and advocacy groups at the federal, state, and local levels. A rigorous evaluation of the demonstration projects may be critical to obtaining widespread support for YTD. If the YTD projects actually improve employment and reduce dependency for youth with disabilities, and if these impacts are well-documented by a scientifically rigorous evaluation, then stakeholder groups will be more likely to collaborate with SSA to broadly implement the YTD model.

The core of the evaluation is an impact study of more than 5,000 youth with disabilities who are being randomly assigned to treatment and control groups in three of the original YTD projects (Colorado; Bronx County, New York; and Erie County, New York) and in the three new projects (Miami-Dade County, Florida; Montgomery County, MD; and West Virginia) that were chosen in 2007.

The evaluation includes two major analytic components in addition to the impact study: a process study of the implementation of the seven original YTD projects and the three new projects (though the process study for the non-random assignment sites is not as comprehensive as the analytic and methodological approach that was later developed and refined for the random assignment sites), and a benefit-cost analysis of the six projects that are participating in the random assignment impact study.⁴ The findings from these three components of the evaluation will be presented in eight formal reports. This report presents findings from the process study of the

⁴ For further details on the design of the national evaluation of YTD, please refer to Rangarajan, Fraker, et al. (2009).

original projects; it is the only planned report that includes findings on the four YTD projects that did not implement random assignment. A series of six project-specific reports will present one-year impact estimates and detailed findings from the process study for the random-assignment projects. These reports will be delivered to SSA in 2010 for the three original projects and in 2012 for the three new projects. The final evaluation report in 2014 will present three-year and four-year impact estimates and summary findings from the process study for the six random assignment projects.

D. Introduction to the Original YTD Projects

As previously noted, SSA awarded five-year cooperative agreements to seven organizations to design and operate the original YTD projects. In 2007, two of these agreements (Iowa and Maryland) were terminated early due to performance challenges. Another two (California and Mississippi) were due to expire in September 2008; however, SSA extended these agreements for one year without directly providing additional funding, which is known as a “no-cost” extension. During the extension, California and Mississippi were to provide closure of all project services for participants and guidance to participants on the types of transition services that were available in their communities, including referrals to community employment and/or education service providers. The SSA is indirectly providing additional funding for three of the projects in the national evaluation (Erie County and Bronx County, New York and Colorado) through its evaluation contract with Mathematica. These projects, along with the three new projects that were selected in November 2007, are participating in the random assignment impact evaluation of YTD.

The seven original YTD projects are described briefly below and in Table I.1. Additional details are provided in Chapter II.

- **Bridges to Self-Sufficiency (California).** The California Department of Rehabilitation led this project, which served youth in seven sites across the state. The principal services were benefits planning and coordination of services by various providers. Current status: operated as a YTD project until September 2009 and continues to operate under alternative funding.
- **Colorado Youth WINS (Colorado).** Colorado WIN Partners/JFK Partners of the University of Colorado Denver led this project, which was housed in One-Stop Workforce Centers in four counties. The principal services were benefits planning, career counseling, individualized job development, and service coordination. Current status: operated as a random assignment evaluation project until January 2010.
- **Transition WORKS (Erie County, New York).** The Erie 1 Board of Cooperative Educational Services led this project, which was originally designed to provide student- and family-centered planning and coordination of services in school-based settings. It evolved to serve both current and former students in non-school settings and to include job development and job placement among its key services. Current status: operated as a random assignment evaluation project until December 2009.

Table I.1. Overview of the Original Projects in the YTD National Study

| Characteristic | California | Colorado | Erie County, NY |
|-----------------------|--|---|--|
| Project name | Bridges to Youth Self-Sufficiency | Colorado Youth WINS | Transition WORKS |
| Lead organization | California Department of Rehabilitation | Colorado WIN Partners/JFK Partners of the University of Colorado Denver | Erie 1 Board of Cooperative Educational Services |
| Partner organizations | Allen, Shea and Associates, a California-based evaluation firm; the five school entities contracted to provide services to youth; various state and local agencies | One-Stop Workforce Centers and various state and local agencies | The Parent Network of Western New York, Neighborhood Legal Services; Community Employment Office; various state and local agencies |
| Geographic scope | Capistrano/Saddleback Valley Unified School District; Irvine-Newport Mesa Unified School District; Riverside County Office of Education; Vallejo City Unified School District; Whittier Union High School District | El Paso, Larimer, and Pueblo Counties | Erie County (including Buffalo) |
| Target population | Students ages 14 through 25 (current beneficiaries and at-risk population) | SSA beneficiaries ages 14 through 25 | SSA beneficiaries ages 16 through 25 |
| End date | September, 2009 | January, 2010 | December, 2009 |
| Length of services | Not specified - as long as needed through project end date | Up to two years | 18 months, followed by employment supports |

Table I.1. Overview of the Original Projects in the YTD National Study (continued)

| Characteristic | Iowa | Maryland | Mississippi | Bronx County, NY |
|-----------------------|---|--|--|--|
| Project name | Smart Start | Project Transition | Mississippi Youth Transition Initiative | The Youth Transition Demonstration Project of the City University of New York |
| Lead organization | University of Iowa Center for Disability and Development | Maryland Department of Education | Mississippi Department of Rehabilitation Services | John F. Kennedy, Jr. Institute for Worker Education of the City University of New York |
| Partner organizations | Mason City School District (Mason City, Iowa); Story County School District (Des Moines, Iowa); Veridian Credit Union | Maryland Department of Rehabilitation Services | Mississippi Department of Education; the Arc of Mississippi; Marc Gold and Associates | CUNY colleges and programs and local and state agencies |
| Geographic scope | Mason City and Story County Community School Districts | Maryland School for the Blind, Baltimore County; Wicomico County | Gulfport, Mississippi School District (urban); Harrison County School District (rural); Jackson County (urban) | Bronx County |
| Target population | Students ages 14 through 25 (current beneficiaries and at-risk population) | Students ages 14 years old through graduation (current beneficiaries and at-risk population) | Students ages 10 through 25 with severe disabilities | SSA beneficiaries ages 16 through 19 |
| End date | Terminated March, 2007 | Terminated April, 2007 | September, 2009 | September, 2010 |
| Length of services | Two years | Through high school graduation (approximately three years) | Up to five years | 20 months on average |

- **Smart Start (Iowa).** The University of Iowa’s Center for Disability and Development led this project, which served current and former students in two school districts. The project’s design called for the cashing out of services that are available to a youth through a number of programs and the consolidation of those funds in one account. With advice from Smart Start counselors, the youth would use those funds to purchase services that are most responsive to his or her needs. Current status: terminated by SSA in 2007 due to delays in the implementation of the intervention.
- **Project Transition (Maryland).** The Maryland State Department of Education led this project, which served students in two school districts and at the Maryland School for the Blind. Services included early involvement with the Division of Rehabilitation Services, benefits counseling, and family support. Current status: terminated by SSA in 2007 due to inadequate administrative and state infrastructure support.
- **Mississippi Youth Transition Innovation (Mississippi).** The Mississippi Department of Rehabilitation Services led this project, which served students in two school districts. Services included person-centered planning, customized employment, benefits planning, and individual development accounts. Current status: operated until September 2009.
- **The Youth Transition Demonstration Project of the City University of New York (Bronx County, New York).** The City University of New York (CUNY) JFK, Jr., Institute for Worker Education leads this project, which operates on two of the university’s campuses. This project emphasizes self-determination and self-advocacy for youth and support for parents. It originally featured a four-week summer institute for youth, but when the project entered the random assignment evaluation, that was replaced by a summer work experience. Current status: operating as a random assignment evaluation project until September 2010.

E. Data Sources for this Report

This report is based on data for the original YTD projects covering the period prior to their participation (if any) in the random assignment impact study. This period began with the execution of their cooperative agreements with SSA in September 2003. It ended with the commencement of random assignment in August 2006 for the Colorado and Bronx County, New York, projects and in January 2007 for the Erie County, New York, project. The data reference period for the original projects in Maryland and Iowa ended with their termination by SSA in April 2007 and for the Mississippi and California projects with their close-outs in September 2009.

We obtained the data for this report from the following four sources:

1. **National Evaluation Activities.** The Mathematica-led evaluation team visited each original project at least twice, and often more frequently, during the pre-random assignment period. The focus of the visits was to conduct observations of project operations and host discussions with project managers and line staff. Interviews, either in-person or by telephone, with the management and staff of selected projects were also conducted. The evaluation staff documented the findings from these visits in site visit notes and memos. Conference calls with the management of individual projects provided additional data for this report. Discussions with SSA staff who were responsible for monitoring project performance also yielded valuable information for this report.

2. **Technical Assistance Activities.** Under a separate prime contract with SSA, Virginia Commonwealth University provided the original YTD projects with technical assistance on program design and implementation from October 2004 through September 2006. Since October 2006, TransCen has provided technical assistance to both the original and new projects under a subcontract with Mathematica. The staff of these organizations had frequent in-person and telephone contact with the projects in the course of providing technical assistance, which afforded them opportunities to gather information on how the projects were doing. They passed on key pieces of that information to the evaluation team through formal and informal channels.
3. **Project Documents.** The YTD projects and SSA have produced many documents that are rich sources of data for this report. These include the proposals that the lead organizations submitted to SSA for cooperative agreements to operate the projects, the cooperative agreements themselves, annual updates of the agreements to provide continuation funding, systems/data security plans for the projects, and quarterly progress reports to SSA on the projects.
4. **SSA Administrative Data.** The SSA tracked enrollment into each of the projects and administered the waivers. The participant sample sizes are based on the information that was reported by sites to SSA.⁵
5. **Local Evaluations.** The SSA's cooperative agreements with the lead organizations for the original YTD projects required them to arrange for local evaluations of the projects. These evaluations have been very diverse in terms of the type, quantity, and quality of data they have produced. Several of them entailed the design of management information systems into which line staff entered data on the delivery of services. The local evaluations of the California, Colorado, and Mississippi projects have been sources of especially useful data for the national evaluation team.

F. Purpose of this Report

This report presents findings on the initial implementation of the seven original YTD projects and on their operations during the years prior to the commencement of random assignment. Additional process analysis findings for the three original projects that implemented random assignment will be included in forthcoming project-specific interim reports.

The principal purpose of this report is to provide policymakers and program operators with lessons from the implementation of the original YTD projects that will help them to design and implement employment programs for youth with disabilities. The focus of this report is on the quality of project implementation rather than on whether the projects improved outcomes for the youth they served. The latter topic is the subject of the evaluation's ongoing impact study for the national random assignment projects only. Findings from the impact study will be presented in forthcoming project-specific interim reports and in the final evaluation report.

⁵ Projects reported participant information to SSA, including social security numbers. This information was recorded for all participants, including those who were not receiving benefits.

G. Report Roadmap

Four chapters comprise this report. Following this introductory chapter, Chapter II describes the key features of each project, highlighting those that are unique among the YTD projects. Chapter III presents the intervention designs, components, and approaches that were associated with successful implementation of the original YTD projects, as well as those that were associated with less successful implementation. The report closes with summary conclusions in Chapter IV.

The report also includes an appendix that documents the use of SSA work incentives and waivers across the YTD projects. The findings provide supplemental information on the use of SSA waivers and work incentives by the subgroup of YTD youth who received SSI or SSDI benefits.

II. PROJECT DESCRIPTIONS

Though the seven original YTD projects included common features described in Chapter I, each project had unique characteristics that differentiated it from the others. For example, in some cases the lead agency was the state vocational rehabilitation agency, while in others it was the Department of Education or some other entity. There was also variation in partner organizations because decisions around such partners were driven by the proposed service delivery strategy and the internal capacity of the lead agency to provide services. Moreover, program components were often project-specific.

In order to capture and present such variation, this chapter provides brief descriptions of each of the original seven YTD projects. First, project characteristics such as the lead agency, program objectives, partner organizations, staffing structure, and program components are presented. This is followed by an overview of the YTD project, and concludes with a discussion of the projects unique features and current status.

As noted in Chapter I, three of the projects—the two New York projects and the Colorado project—were subsequently selected to participate in the random assignment evaluation. The information presented in this chapter focuses primarily on their pre-random assignment project structure. However, the description of the current status of each of these projects touches on their experiences in the random assignment evaluation.

A. The California YTD Project

Table II.1. Overview of the California YTD Project

| | |
|---------------------------------|--|
| Project name | California Bridges to Youth Self-Sufficiency |
| Lead organization | California Department of Rehabilitation |
| Project goals/objectives | <p>Increase the self-sufficiency of transition-aged youth with disabilities by decreasing dependence on public benefits, including SSI. Objectives included:</p> <ul style="list-style-type: none"> • Improve employment and educational outcomes • Ensure satisfaction and informed choice in pursuit of individual employment goals • Collaborate and build partnerships with systems serving transitioning youth with a goal of integrating services and blending resources • Implement data collection and analysis to evaluate the effectiveness of the proposed strategies |
| Partner organizations | Allen, Shea and Associates, a California-based evaluation firm; the five school entities contracted to provide services to youth; various state and local agencies |
| Geographic scope or location(s) | The communities served by the following school districts: Vallejo City Unified School District, Riverside County Office of Education, Whittier Union High School District, Irvine/Newport-Mesa Unified School District Consortium, and Capistrano/Saddleback Valley Unified School District Consortium |
| Target population | SSI, SSDI and CDB beneficiaries or at risk of becoming beneficiaries ages 14 through 25 |
| Length of services | Service provision lasted for as long as students wanted and needed them up through the end of project funding; follow-along services were available to youth who graduated |
| Staffing structure | The intervention relied on the cooperation of existing school-based staff; each participating program was staffed by a benefits coordinator and a services coordinator |
| Program Components | <p>Services were built on existing school-based transition services provided by CDOR and the California Department of Education and included:</p> <ul style="list-style-type: none"> • Employment preparation and training • Paid and unpaid employment placements • Service coordination, including health services • Benefits counseling • Development of action plans • Training of staff, including teachers, on public benefits |
| Enrollment | 504 youth were enrolled over the five years of project funding |

1. Overview

The California Bridges to Youth Self-Sufficiency (Bridges) program enhanced two existing transition programs for youth in special education: the Transition Project Partnership (TPP) and WorkAbility I (WAI) program. TPP is administered by the California Department of Rehabilitation (CDOR) and targets students within two years of exiting high school. TPP services include employment preparation and training and post-secondary education. WAI, which is administered by the California Department of Education (CDOE), targets youth in special education as early as middle school. They provide pre-employment preparation and paid and unpaid employment. Because TPP and WAI are intended to complement one another, it is possible for youth to participate in both.

Bridges enhanced existing transition services by providing a benefits coordinator to help youth navigate the SSI program in addition to other public benefits, and a services coordinator to help youth access needed services. Working closely with both youth and their families, there was a strong emphasis placed on self-determination and advocacy skills. The benefits and services coordinators worked together to develop an action plan, and worked closely with transition specialists in the participating schools. Target youth were not required to be participants of TPP or WAI, though many were.

Aside from the Riverside site, which was administered by the county's department of education, projects were administered by the Unified School Districts. In addition, two of the sites were shared by neighboring school districts: Irvine/Newport Mesa and Capistrano/Saddleback Valley. Those Unified School Districts shared the resources allocated to each participating site. Given the differences in administration, there were some challenges in terms of fidelity to the overall intervention design as the projects were being implemented.

2. Unique Features

There were several features that differentiated the California YTD project from the other YTD projects. These features are discussed below.

Highly effective linkages with partner agencies. Bridges established linkages with a variety of local and state partners. As noted above, Bridges enhanced two existing transition programs, one of which was operated by the state vocational rehabilitation agency and the other by the state education department. While CDOR was the lead organization, it was able to work effectively with CDOE to successfully implement the project. In addition, each project had a local advisory committee composed of representatives from local agencies or organizations that could provide appropriate guidance, and a state steering committee, which met quarterly. The state steering committee included representatives from the Employment Development Department, the Governor's Committee on Employment of People with Disabilities, the Department of Health Services, the Department of Mental Health, and the California Workforce Investment system, among others. The committee not only ensured that the Bridges project was receiving appropriate guidance; it also involved numerous entities that had a stake in successful youth transition.

Highly effective in linking resources. Since its inception, there was a recognition that a key aspect of the Bridges model was the ability to link to existing resources in the community. Bridges

staff continuously sought to identify new resources. For example, early on, the Whittier Union High School District agreed to be an Employment Network (EN) for the Ticket program. By the end of the project, all the sites were ENs.⁶ Another example related to transportation. In order to solve transportation barriers, staff sought creative approaches such as partnering with the local transportation agency to identify funding and transportation vouchers to assist participants in getting to work. A final example was partnerships with hospitals, which led to four Bridges sites implementing Project SEARCH, a customized job placement program in a hospital setting which led to long-term competitive employment for several participants.

Local evaluation approach. In Bridges' original application for funding, data collection and reporting was cited as an important goal of the project. CDOR contracted with the evaluation firm Allen, Shea and Associates to oversee the development of a management information system and to regularly analyze data used to guide project management and inform key stakeholders of project successes. Numerous benchmarks and metrics were regularly assessed to ensure the project was on target, and a culture of data was developed across the project so that each local site was provided information on key outcomes regularly and felt responsible for meeting or exceeding established benchmarks. In addition, the evaluation firm conducted periodic surveys in the sites, conducted interviews with program staff, and observed team interactions with participants to inform their research; they documented their findings regularly and shared those with key stakeholders.

Use of Youth Action Plans. Each youth participating in Bridges developed an action plan using an approach similar to person-centered planning, which included support and advocacy during the IEP and Transition Planning process. Youth were encouraged to invite anyone to the planning session that could play a role in helping them make a successful transition, including family members, friends, or teachers. The facilitator would then engage everyone in a discussion to establish transition goals and develop a roadmap of how the youth will be able to meet those goals. The local sites were successful in working with youth to ensure that multiple stakeholders were present for, and actively involved in, these planning sessions.

3. Current Status

Bridges enrolled 504 youth into project services. The SSA granted the Bridges project a no-cost extension in September 2008. The SSA-funded project services ended in September 2009. The extension allowed Bridges staff to personally guide participants towards their employment and/or educational goals. California had a strong sustainability plan and project services continue in partnership with Project SEARCH and others.

⁶ Prior to receiving the no-cost extension from SSA, a total of 39 tickets were accepted. An additional 25 tickets were accepted between September 2008 and June 2009.

B. The Colorado YTD Project

Table II.2. Overview of the Colorado YTD Project

| | |
|---------------------------------|---|
| Project name | Colorado Youth WINS |
| Lead organization | Colorado WIN Partners/University of Colorado Denver |
| Project goals/objectives | <p>Assist youth with disabilities who are receiving SSI, SSDI or CDB benefits to receive better coordinated services, meet their employment and educational goals and achieve economic self-sufficiency and independence. Objectives included:</p> <ul style="list-style-type: none"> • Better coordination and access to community services • Better understanding of benefits • Youth empowerment • Enhanced educational outcomes • Improved employment outcomes |
| Partner organizations | One-Stop Workforce Centers and various state and local agencies |
| Geographic scope or location(s) | El Paso, Larimer, and Pueblo Counties |
| Target population | SSI, SSDI and CDB beneficiaries ages 14 through 25 |
| Length of services | Participants received at least 18 months of services |
| Staffing structure | The intervention relied on Independence Teams (I-Teams) which were located in the Workforce Centers; these teams consisted of at least one disability program navigator (DPN), one benefits counselor and one career counselor, as well as a local supervisor who worked in the Workforce Center. |
| Program Components | <p>Services were provided by the I-Teams and included:</p> <ul style="list-style-type: none"> • Individual case management • Person-centered planning • Disability program navigation • Benefits counseling • Career Counseling • Job development • YTD waivers |
| Enrollment | 30 youth were enrolled over the pilot period |

1. Overview

During the pilot period, Colorado Youth WINS (CYW) developed I-Teams (short for independence teams) in three geographically dispersed One-Stop Workforce Centers. Each I-Team included a disability program navigator, benefits counselor, and career counselor. The primary goal of these I-Teams was to coordinate a variety of local services and fill gaps in these services in order to help youth achieve their educational and employment goals. To achieve these aims, CYW worked to develop relationships with youth, families, and a variety of local services providers. CYW's key partnership was with the One-Stop Workforce Centers; a variety of employment and educational resources were leveraged through this relationship. Additionally, the I-Teams sought to build strong relationships with the One-Stops' existing Workforce Investment Act (WIA) partners, particularly the Colorado Division of Vocational Rehabilitation (DVR), local mental health centers, local school districts, and the Colorado Division of Developmental Disabilities (DDD). This pilot period provided important experience in enrollment and recruitment efforts, obtaining informed consent, marketing and working with partner agencies. During this time CYW worked with SSA and technical assistance partners to strengthen the employment components of its intervention by focusing more on direct employment supports and benefits counseling services for youth.

2. Unique Features

There were several features that differentiated the Colorado YTD project. These features are discussed below.

Partnership with One-Stop Workforce Centers. One-Stop Workforce Centers are found in every large community in Colorado and across the country, and are designated as the single point of contact and entry for any person seeking employment, both disabled and able-bodied. The I-Teams made strong efforts to be included in general Workforce Center activities and to be seen as an integral part of general Workforce Center services. Integration with the Workforce system allowed CYW to access an array of resources, such as educational programs (GED classes and postsecondary education), job listings, employer databases, assessments, and training.

Focus on case management and disability program navigation. CYW had a strong focus on disability program navigation and case management services. Their initial model drew heavily on the Disability Program Navigator (DPN) Initiative that was implemented in selected One-Stop Workforce Centers and was funded jointly by the U.S. Department of Labor and SSA. The Disability Program Navigator Initiative helped people with disabilities navigate through the challenges of seeking work, educated One-Stop staff, and informed beneficiaries and others with disabilities about the work support programs available in their communities. The CYW DPN helped youth access services from various government agencies and community-based organizations, as well as advocates on their behalf with these entities. They sought to fill gaps by trying to solve system shortcomings and ensure that youth received services to which they were entitled.

Local evaluation approach. CYW was interested in rigorously evaluating its services through a process analysis and a limited random assignment study. Using lists of beneficiary youth generated by SSA, CYW tested random assignment designs to assess which design would yield high enrollment rates during the pilot phase. In addition, CYW conducted a local process evaluation with an emphasis on understanding how to replicate the I-Teams in other Workforce Centers, both within Colorado and nationally.

3. Current Status

In spring 2006, CYW was selected to participate in the national YTD evaluation. CYW made modifications to their services, particularly focusing more upon direct employment services and supports. These additional supports included expanded training for both career counseling and benefits counseling staff, and a greater emphasis on job development activities done alone or in partnership with other agencies. After these modifications, CYW went on to enroll more than 400 students in their YTD project across four counties. (Boulder was added as a fourth site.) The project ended in January 2010 though Colorado WIN Partners has been exploring the possibility of using this model at One-Stops throughout the state.

C. The Erie County, New York, YTD Project

Table II.3. Overview of the Erie County, New York, YTD Project

| | |
|---------------------------------|--|
| Project name | Transition WORKS |
| Lead organization | The Erie 1 Board of Cooperative Education Services |
| Project goals/objectives | Prepare youth with disabilities who are receiving SSA benefits to achieve maximum independence and economic self-sufficiency. Objectives included: <ul style="list-style-type: none"> • Increase coordination of transition process among key agencies • Facilitate student self-determination and self-advocacy • Improve access to community services • Professional development for school and agency personnel |
| Partner organizations | The Parent Network of Western New York; Neighborhood Legal Services; the Community Employment Office; various state and local agencies |
| Geographic scope or location(s) | Erie County, including the city of Buffalo |
| Target population | SSI, SSDI, and CDB beneficiaries ages 12 through 25 |
| Length of services | Participants received at least 18 months of intensive services, followed by employment supports as necessary |
| Staffing structure | The project was staffed by transition coordinators and job developers employed by Erie 1 BOCES; benefits counselors employed by Neighborhood Legal Services; parents affiliated with the Parent Network deliver Transition Works services |
| Program components | Services provided by project staff included: <ul style="list-style-type: none"> • Redesign of collaborative practices among key agencies • Self-determination curriculum • Person-centered transition planning and career exploration • Benefits planning and advisement • Binder building workshops • YTD waivers |
| Enrollment | 46 youth were enrolled over the pilot period |

1. Overview

The Erie 1 Board of Cooperative Education Services (BOCES) began piloting its intervention, Transition WORKS (TW), in June 2004. The pilot served a total of 46 youth age 12 and older who were in or out-of-school. The key components of the pilot were: self-determination curriculum, person-centered transition planning and career exploration, benefits advisement, binder-building workshops (which helped participants to organize the paperwork required for transition services and familiarized them with the adult service system), and YTD waivers. TW staff developed a classroom-based self-determination curriculum for in-school youth, which included a scrapbook activity for youth and their families, highlighting goals in four distinct areas: live, learn, work, and play. The in-school youth also participated in field trips to employers and other career development activities. (TW staff planned to customize this curriculum by grade, starting in middle school and progressing through the senior year.) In addition, the in-school youth received person-centered planning, which were coordinated with their individualized education program (IEP). The out-of-school youth received portions of the self-determination curriculum, including the scrapbook activity, and person-centered career planning. The project also provided vocational assessment and career counseling to all participants. The intervention provided one-on-one benefits advisement and information on YTD waivers to all participating youth. All youth and parents were encouraged to participate in a binder building workshop.

2. Unique Features

There were several features that differentiated the Erie County project from the other YTD projects. These features are discussed below.

Unique lead organization. TW was led by Erie 1 BOCES, one of 37 regional public education service organizations that serve school districts throughout New York State and was the only YTD project led by a local educational agency. The Erie 1 BOCES provides educational services to 20 school districts, serving about 73,000 students in Erie County. Among other services, Erie 1 BOCES provides academic and functional programs and related special education services, including counseling, occupational, physical and speech therapy, and hearing and vision services during the school year. It also offers a six-week summer program for youth with disabilities. Although Erie 1 BOCES serves Erie County, surrounding but not including the city of Buffalo, TW served eligible youth both in Erie County and the city of Buffalo.

Partnership with a legal services entity for benefits counseling. Erie 1 BOCES partnered with Neighborhood Legal Services (NLS) to deliver benefits planning services, including counseling on the YTD waivers, to participating youth. NLS is a legal services corporation that provides services to low-income families and people with disabilities. With three offices throughout the state of New York, including one in downtown Buffalo that serves Erie County, NLS operates about 14 disability-specific projects, including work incentives planning and assistance for TW youth and families.

Partnership with the local Community Employment Office. Erie created opportunities for employment and work experience by partnering with a well-known employment office. The office was located in a major retail mall and had an extensive employer network. This partnership provided a link to the One-Stop Workforce Center, a primary resource for out-of-school participants.

Emphasis on self-determination. From the outset, TW was guided by a strong philosophy of youth empowerment based upon a person centered, self-determination model. During the project

pilot phase, TW staff developed a self-determination curriculum and trained special education teachers in the Erie County school districts to implement it in their classrooms. Teachers in schools could choose to use this curriculum, and any student could receive it, regardless of whether they participated in the YTD project.

3. Current Status

The original design for TW focused on implementation of the self-determination curriculum and included an individualized random assignment design for out-of-school youth and a clustered randomized design with classrooms as the unit of random assignment for in-school youth. After being selected to participate in the national YTD evaluation in spring 2006, the project was modified to adopt an individualized random assignment design for all youth, targeting SSA beneficiaries in the age group 16 to 25, and modifying the self-determination curriculum for instruction by TW staff in small groups rather than classrooms. Erie enrolled 400 students in YTD services in two phases over a 16-month period from February 2007 to May 2008. Its modified program included self-determination assessment and training, individualized transition planning, benefits planning and counseling, education-related services, and employment related services. The project provided family support and networking through the binder-building workshops. The project no longer conducted the scrapbook activity as part of the intervention. TW ended project services in December 2009.

D. The Iowa YTD Project

Table II.4. Overview of the Iowa YTD Project

| | |
|---------------------------------|---|
| Project name | Smart Start |
| Lead organization | Employment Policy Group, Center for Disabilities and Development, University of Iowa |
| Project goals/objectives | Support the successful transition of students with disabilities from school to employment and economic self-sufficiency by coordinating and integrating services and benefits available through IDEA, Medicaid, WIA, VR, and Ticket to Work. Objectives included: <ul style="list-style-type: none"> • Improve employment and economic self-sufficiency • More efficient use of public financial resources through increased student and family control • Student self-determination and self-advocacy • Expanded student and family choice over education, training, transition services, and employment supports |
| Partner organizations | Mason City School District (Mason City, Iowa); Story County School District (Des Moines, Iowa); Veridian Credit Union |
| Geographic scope or location(s) | Story County and Mason City Iowa |
| Target population | SSI, SSDI, and CDB beneficiaries or at risk of becoming beneficiaries ages 14 through 23 who lived in the target geographic area. |
| Length of services | Participants received services for two years |
| Staffing structure | The project was staffed by a project director along with a services coordinator and a services liaison in each district; personal agents were recruited to serve as mentors and were paid a nominal hourly wage. |
| Program components | Program components included: <ul style="list-style-type: none"> • Combining into a single bank account public resources available for transition to employment and independence which was managed by the youth and family • Literacy training provided by a local credit union, which also held the bank account and assisted the youth with approving and making expenditures • Development of a consumer-directed, enhanced IEP, containing a budget detailing how the public resources will be spent • Assistance with accessing community resources and developing independent thinking skills, provided by a personal agent who was a community volunteer not affiliated with the disability service system • YTD waivers |
| Enrollment | A total of 70 youth were enrolled over the three and a half years of project funding |

1. Overview

Smart Start was based on the vision that youth and their families will use services more efficiently and experience a greater sense of personal empowerment if they are able to “cash out” the value of services they would have received from existing service systems (for example, education, Medicaid, Workforce Investment Act, and vocational rehabilitation) and use those funds to purchase services tailored to their unique needs and goals. The cashed-out funds would be deposited into individual credit union accounts for each student. These funds would then be managed by the youth, with support from family and a personal agent or community representative of their choosing. The schools would work with the youth and their supporters to enhance their IEPs to include a budget for the combined public resources. The enhanced IEPs would serve as a transition plan for youth as they moved from the school system to employment and independence, allowing the youth greater self-direction in their transition planning as they managed their transition services via their credit union accounts. The project’s goal was to enroll 30 youth in year one, 100 in year two, and 200 in year three, for a total of 330 youth.

2. Unique Features

There were several features that differentiated the Iowa YTD project from the other YTD projects. These features are discussed below.

Blending of resources. Smart Start was based upon the blending of resources available to youth and their families making the transition from school to work or independence, including Individuals with Disabilities Education Act (IDEA), Workforce Investment Act (WIA), Medicaid, Ticket to Work, and others into a single account. All of these potential sources of cash were intended to support an enhanced IEP. The enhanced IEP would include an individualized budget designating how the cashed-out funds were expended. This budget was the hub of the program and the foundation on which self-direction was to begin.

Literacy training and use of a fiscal intermediary. The Veridian Credit Union provided literacy training to youth and families and established personal accounts for participating youth. The design for Smart Start also called for the credit union to assist with approving and paying for services and products when funds were cashed out.

Use of personal agents. Smart Start encouraged greater self direction among youth by facilitating access to personal agents, people in the local community and not part of the existing service system who could help the youth and family to think outside the limitations of existing bureaucracies to successfully manage their cashed-out funds. These personal agents were also to help youth become self-advocates via the enhanced IEP process.

3. Current Status

The project was terminated on March 31, 2007. Smart Start enrolled 70 youth; 42 opened a credit union account, 27 completed a financial literacy course and 28 were assigned a personal agent. The cashing out of existing services never materialized and no enhanced IEPs with budgets were developed. A project called Consumer Choices, which operates in Iowa with support from the Robert Wood Johnson Foundation, successfully cashed out Medicaid 1915(c) waiver funds for 13 Smart Start youth to provide community-based services. However, this cashing out of service dollars was a separate and distinct program outside the scope of Smart Start. We know of no other cash-out options that were made available to Smart Start participants.

E. The Maryland YTD Project

Table II.5. Overview of the Maryland YTD Project

| | |
|---------------------------------|--|
| Project name | Project Transition |
| Lead organization | Maryland State Department of Education (Division of Special Education/Early Intervention Services) |
| Project goals/objectives | <p>Expand opportunities for in-school youth to obtain needed services as they prepare to transition into independence and the world of work. Objectives included:</p> <ul style="list-style-type: none"> • Integrate expanded VR services into all aspects of the transition process beginning at age 14 • Assist in coordinating school services through IEPs • Build a stronger connection to school services by conducting outreach to families • Provide additional case management and other supports needed by families. |
| Partner organizations | Maryland Division of Rehabilitation Services |
| Geographic scope or location(s) | Baltimore County, Wicomico County, Maryland School for the Blind |
| Target population | Special education students ages 14 and older who were enrolled in high school or in the Maryland School for the Blind |
| Length of services | Services were provided until youth graduated from high school (approximately three years) |
| Staffing structure | The intervention included a consumer navigator who assisted youth in coordinating school and vocational rehabilitation services; a family support and benefits coordinator who provided case management and benefits counseling support; and a VR counselor who was paid through the project to provide earlier access to VR services. |
| Program components | <p>Program components included:</p> <ul style="list-style-type: none"> • Access to VR supports provided by a dedicated VR counselor from DORS • Transition planning, including attending IEP meetings • Benefits counseling • Transportation and tutoring services • Family and case management support • Other support services such as support for independent living skills, access to assistive technology, and day care service • YTD waivers |
| Enrollment | 167 youth were enrolled in two regions over the three and a half years of project funding |

1. Overview

The Maryland State Department of Education (MSDE) implemented Project Transition in several school districts in Maryland with the primary objective of providing transition services based on an enhanced network of rehabilitation and education services, as well as community supports. Project Transition was implemented in five public schools in Baltimore County, eight public schools in Wicomico County, and at the Maryland School for the Blind.⁷ A key focus of Project Transition was to create a linkage to vocational rehabilitation (VR) services before the youth turned age 14. Project Transition made this linkage by paying the salary of a VR counselor to focus specifically on Project Transition youth. The intervention services from the project were delivered by a team of consumer navigators and benefits coordinators, as well as VR counselors from the Maryland Division of Rehabilitation Services (DORS). The consumer navigators provided intensive case management supports and were important in linking youth with the more specialized benefits and employment supports offered by the benefits counselors and VR counselors. To ensure that youth were receiving appropriate school services, project staff attended IEP meetings and also provided supplemental funding for transportation and tutoring services. There were local advisory boards to oversee the project's operations.

2. Unique Features

There were a number of features that differentiated Project Transition from the other YTD projects. These features are discussed below.

Unique lead agency. Project Transition was the only original YTD project with a state level education agency as the lead organization, which many school staff credited as a key asset to leveraging school-based transition services for youth. This relationship was vital in establishing credibility with school staff at IEP meetings. However, the project's funding structure created some challenges. Within MSDE, Project Transition operated as a grant-based project under the Division of Special Education/Early Intervention Services, which required all employees on a grant-based project to be contractual employees. This regulatory restriction limited the scope of fringe benefits that could be paid to project staff and contributed to high staff turnover.

Partnerships with vocational rehabilitation counselors. A key objective of Project Transition was to help students gain access to vocational rehabilitation and employment support services from DORS earlier in their academic careers. Prior to Project Transition, youth generally received support from DORS only in their junior year and, in some cases, in the last semester of their senior year. The provision of a dedicated VR counselor to the project allowed Project Transition to start serving youth as early as their freshman year in high school. The dedicated VR counselors worked with Project Transition staff to provide early access to supports for younger youth and more enhanced access to VR related services for older youth, including job coaching, job shadowing and internship services. DORS provided funding for services extended to juniors and seniors, and the project funded services for freshmen and sophomores.

⁷Participants from the Maryland School for the Blind (MSB), which generally included youth with multiple serious impairments, received more specialized supports that differed from the services provided in the Baltimore and Wicomico public schools. The services for MSB were provided to offset the cutback in state services to youth attending this school. The description here focuses on the services provided in the Baltimore and Wicomico public schools, which was the focus of most of the Project Transition services.

The combination of school and family supports. Project Transition staff's interaction with school staff and the families of participating youth was important in facilitating enhanced school-based services for youth. The schools viewed this as a valuable service because project staff could actually go to families and visit with them, and thereby were able to establish an important connection between schools and families. Based on this interaction, Project Transition staff identified school-based resources for the youth, especially tutoring services, which were cited as valuable supports by several school staff members.

3. Current Status

Project Transition enrolled 167 youth during its operational phase and provided supports that were designed to provide earlier access to employment services, especially VR supports, and other services during high school to participants. However, the project experienced high staff turnover and a lengthy vacancy of the project director position, which led to inconsistent staffing. Additionally, there was a lack of coordination at the senior management level of several partner agencies. Ultimately, SSA discontinued funding and the project ceased operation on April 30, 2007.

F. The Mississippi YTD Project

Table II.6. Overview of the Mississippi YTD Project

| | |
|---------------------------------|--|
| Project name | Mississippi Youth Transition Innovations Project |
| Lead organization | Mississippi Department of Rehabilitation Services |
| Project goals/objectives | <p>Reduce dependence on disability benefits and accrue savings to the Social Security trust fund through the delivery of innovative program services that help youth achieve self-sufficiency goals, increase employment experiences and outcomes of youth with disabilities, and identify different uses of public resources that would generate positive outcomes for youth with disabilities. Objectives included:</p> <ul style="list-style-type: none"> • Assist youth to achieve short-term outcomes, such as high school completion, enrollment in post secondary education, and access to employment experiences, including part time work and internships • Assist youth in exploring career options through job shadowing or work exploration • Promote and help youth achieve long-term employment goals |
| Partner organizations | Mississippi Department of Education; Marc Gold and Associates; Arc of Mississippi; Gulf Coast Workforce Board and Gulf Coast Business Services Corporation |
| Geographic scope or location(s) | Gulfport, Jackson, and Harrison Counties |
| Target population | Youth ages 10 through 25 with moderate to severe disabilities |
| Length of services | Participants received up to five years of project services |
| Staffing structure | Project staff included a project director; a benefits specialist; a vocational rehabilitation counselor; transition specialists; a consultant from Marc Gold and Associates to provide local operational management, help guide implementation, and provide technical assistance; in-kind support was provided in the form of a project executive and a One-Stop navigator |
| Program components | <p>Project components included:</p> <ul style="list-style-type: none"> • Information sessions for those interested in learning more about public benefits and how employment may impact such benefits • Benefits counseling • Use of student budgets to pay for employment services • Discovery process (person-centered planning) • Customized employment experiences • Coordination of WIA services with the One-Stop • Asset development opportunities through Individual Development Accounts (IDAs) |
| Enrollment | 197 youth were enrolled over the five years of project funding |

1. Overview

The Mississippi Youth Transition Innovations (MYTI) project offered both information services and intensive services. Information services were short-term and designed to cast a wide net, targeting youth with disabilities and their parents. The primary goal was to promote the idea that all youth, regardless of disability, could become employed with the right set of supports. Information on SSA benefits and work supports was provided, and benefits counseling services were available to those families that requested it.

Intensive services were delivered to a subset of the youth population, which was chosen by a selection committee. These services were delivered in four phases, each with different objectives and target ages. Phases I-III were delivered in school and youth could be recruited into any phase. All phases included a person-centered discovery process designed to help the staff become better acquainted with the youth and their goals, as well as benefits analysis and advisement; customized employment was a key feature of the job development piece. The following is a description of the four phases:

- **Phase I:** Ages 10-13—this phase was primarily to foster interest in employment and to help youth and their families recognize that employment as an option. Youth, with program staff support, developed life portfolios, a collection of images and descriptions that the youth develop representing their goals and aspirations.
- **Phase II:** Ages 14-18—this phase focused on helping the student develop an interest in work and sometimes included a work experience.
- **Phase III:** Ages 19-21—this phase was much more work-focused and typically included a customized, paid job. These jobs were unsubsidized and generally paid the prevailing wage rate or better. Participants were also introduced to the One-Stop Workforce Center and were encouraged to access its services.
- **Phase IV:** Age 22-25—the services in this phase were the same as in Phase III, but were delivered through the rehabilitation system rather than the education system because the youth were out of school.

2. Unique Features

There were several features that differentiated the MYTI project from the other YTD projects. These features are discussed below.

Strong focus on customized employment. Customized employment was a central feature of the MYTI intervention. Beginning with the discovery process, which resulted in a vocational profile, youth interest drove job matches rather than skill or aptitude assessments. Staff were provided with extensive technical assistance on job development techniques that emphasized a customized employment approach.

Development of Individualized Development Accounts. Inclusion of asset building services was an option for all of the YTD projects; a YTD waiver directly targeted IDAs. However, given the intensive nature and resources required to implement IDAs, few YTD projects opted to include this component in a significant way. MYTI, however, was able to successfully implement this component. As of September 30, 2009, 13 participants were participating in the IDA

component, and had reached their \$1,000 saving goal.⁸ Based on these results, MYTI was often cited as a successful example of IDA implementation.

Highly resourceful in the use of student budgets. MYTI set aside a small amount of funding to support student budgets. Student budgets were used to purchase self-directed supports and services to allow participants to be successful at work. The student budgets emphasized the shared role of government and personal resources.

The impact of Hurricane Katrina. The Gulfport region was devastated by Hurricane Katrina in August 2005. The hurricane's immediate impact and its aftermath affected program services in numerous ways: many program staff became homeless or had displaced individuals living with them; program participants and their families were difficult to locate because many had lost homes; and many schools and other buildings were damaged or destroyed, making service delivery challenging. Despite these overwhelming challenges, the MYTI staff remained focused on the primary goals of their intervention and the project was up and running in relatively short order. Within a few months of the hurricane, many participants had been located, and project services resumed. As a direct result of Hurricane Katrina, the Gulfport Municipal school district was not able to provide the project the support it needed and ceased its participation at the end of year three of the cooperative agreement (September 2006). The Jackson County public school system joined the project in September 2006.

3. Current Status

MYTI enrolled 197 youth into project services. The SSA granted the MYTI project a no-cost extension, in part because of the time lost to Hurricane Katrina. Project services ended in September 2009; however, Mississippi has continued to provide oversight of the IDA implementation by one vocational rehabilitation staff member.

⁸The project also offered IDA's to non-MYTI participants. As of September 2009, a total of 21 individuals were participating in the IDA program, and had a combined savings of \$19,812.77. Fourteen had reached their \$1,000 savings goal. Though the MYTI program services have ended, individuals continue to have access to their IDA savings and matching funds through the life of the IDA program.

G. The Bronx, New York, YTD Project

Table II.7. Overview of the Bronx, New York, YTD Project

| | |
|---------------------------------|--|
| Project name | CUNY Youth Transition Demonstration Project |
| Lead organization | John F. Kennedy, Jr. Institute for Worker Education of the City University of New York |
| Project goals/objectives | Prepare youth with disabilities who are receiving SSI benefits to achieve maximum independence and economic self sufficiency. Objectives included: <ul style="list-style-type: none"> • Increased coordination of transition process • Better access to community services • Student self-determination and self-advocacy • Informed activism by parents • Professional development for school and agency personnel |
| Partner organizations | Lehman College; New York City Department of Education District 75 (special education); Benefits Planning, Assistance and Outreach (BPAO); Queens Independent Living Association; local and state agencies ⁹ |
| Geographic scope or location(s) | Bronx County, New York |
| Target population | SSI beneficiaries or those at risk of becoming beneficiaries ages 16 through 19 who resided and attended a District 75 school in the Bronx |
| Length of services | Participants received services for one year |
| Staffing structure | Project staff included project director; transition and career development specialists; parent advocates; mentors who were college students with disabilities |
| Program components | A summer Institute for youth was a centerpiece of the intervention, which included: <ul style="list-style-type: none"> • Social and recreational events • Self-advocacy and parent support groups • Seminars for teachers, leading to Transition Services Certificate • Summer employment through Lehman College Year round activities included: <ul style="list-style-type: none"> • After-school student self-determination/self-advocacy group • Parent support groups • Professional development/certificate in transition services for school personnel and agency staff |
| Enrollment | 87 youth enrolled in two pilot cohorts (<i>Pioneer</i> cohort started May 2004, <i>Pilot</i> cohort started May 2005) |

⁹BPAO services are now provided by organizations under the Work Incentives Planning and Assistance (WIPA) grants.

1. Overview

The City University of New York (CUNY) YTD Project (YTDP) identified best practices in transition services and designed a program to facilitate participant access to entitled services and maximize independence and economic self sufficiency among participants. To achieve these goals, YTDP planned a three-tiered intervention approach: raising awareness of services to which participants were entitled; encouraging participant self-efficacy/self-determination; and encouraging parental activism. The focal point of the intervention was the Summer Institute, which convened annually on the campus of Lehman College to provide self-determination skills training, social and recreational activities, tutoring in basic skills, vocational assessments, benefits counseling referrals, and opportunities for work-based learning. College students with disabilities participated as peer mentors and tutors. The Summer Institute was followed by after-school meetings of students to review self-determination skills. Opportunities for parent support groups and professional development for school and agency personnel were also available. The first YTDP cohort (Pioneers) began in May 2004 and the second cohort (Pilots) one year later.

2. Unique Features

There were several features that differentiated the Bronx County project from the other YTD projects. These features are discussed below.

Unique lead organization. CUNY, the nation's largest urban university, sponsored YTDP and The John F. Kennedy, Jr. Institute for Worker Education administered it. The Institute, located in CUNY's Office of the University Dean for Health and Human Services (then the Central Office of Academic Affairs), was founded in 2000 in partnership with John F. Kennedy, Jr's nonprofit organization, Reaching Up, to support workforce development initiatives in health, education, and human services. Given the institute's expertise in the disability field and its rich array of other programs and services, the YTDP was able to draw on many university and external resources to develop and implement its program.

Unique target population and service environment. The New York City Department of Education operates District 75, a virtual special education district that serves youth with autism, severe emotional disturbances, and/or multiple disabilities. The YTDP targeted Bronx youth who attended District 75 programs, meaning that they were often severely disabled. Given the link to District 75, a goal of the project was to help teachers in these schools continue to develop their skills. Therefore, the institute offered seminars to teachers that could lead to Transition Services Certificates.

Use of college student mentors. Recognizing the importance of developing positive relationships with young adults with disabilities who had successfully entered post-secondary education, an important component of the Summer Institute was to match YTD youth with Lehman College students with disabilities who could serve as mentors. Providing role models for the youth, it was thought, would help them understand that with the appropriate supports, they could achieve their goals.

Local evaluation approach. There was interest in conducting a local random assignment evaluation in order to rigorously evaluate YTDP program services. To assess the feasibility of conducting such an evaluation, CUNY initiated a random assignment process for recruiting its second pilot cohort. Using lists of beneficiary youth generated by SSA, YTDP tested two different random assignment designs to assess which would yield higher enrollment rates. In addition, if able

to enroll at least 50 youth into program services, YTDP had planned to include a third waiver-only group. However, its actual enrollment fell short of that threshold, so a third waiver-only group was not included in the pilot.

3. Current Status

In spring 2006, YTDP was selected to participate in the national YTD evaluation. After some modifications to the program to accommodate the larger scale and to further align it with the broader goals of YTD, YTDP went on to enroll more than 400 youth across three cohorts. The revised and expanded program includes a Saturday workshop series for youth and their families in the fall and spring of each cohort year, followed by a summer employment experience for youth. Participants are also provided benefits planning and counseling and opportunities to engage in person-centered planning at least twice during their tenure with the program. The YTDP is slated to operate until September 2010.

III. LESSONS

This chapter presents six key operational lessons based on the implementation experiences of the original YTD projects. In reviewing this section, it is important to keep two things in mind. First, the lessons noted here are operational in nature and are organized around best program practices; the lessons do not suggest which projects operated strong programs or had positive impacts on the youth that received services. The lessons are primarily based on the extent to which projects were able to successfully implement their program model and begin serving participants.

Second, the lessons are based on information gathered during early site visits and meetings with participating projects and a review of background materials prepared by the sites. As discussed in Chapter 1, a comprehensive process analysis was not conducted during the early phase of the evaluation. Only those projects participating in the national random assignment evaluation are participating in the comprehensive process analysis that is a component of the national evaluation. Though some field visits to the random assignment projects had been completed prior to preparing this report, none of the information presented here is based on findings from those visits. This is to ensure that there is a consistent level of information available for each project.

The lessons presented here are intended to guide future program designers and administrators as they develop interventions that may be similar to YTD. When relevant, key features of particular projects are described. However, readers should refer to chapter 2 for a more detailed overview of each of the YTD interventions.

The six lessons described below are the:

1. importance of strong partnerships
2. risks associated with implementing complex, systems change interventions
3. advantages and limitations of operating small scale programs
4. importance of effectively managing interventions that operate in multiple sites
5. importance of defining and measuring outcomes as an accountability tool
6. need to implement interventions that provide direct employment services to youth.

Each of these lessons is described, and supporting information from the experiences of the seven original YTD interventions is presented.

Lesson 1: Strong partnerships are instrumental to successfully serving youth in transition.

Research and practice suggest the importance of linking systems in order to facilitate the transition process for youth. For example, in their evaluation of the youth continuing disability review, Maximus (2002) find that many youth are “falling between the cracks” of the systems that should be serving them and suggest that future interventions should more broadly coordinate their efforts. Johnson et al (2002) suggest in their review of youth transition services that no one entity can provide all the needed services. Recognizing this, most of the original YTD projects included linkages and collaboration across multiple agencies as one way to build a rich network of services for participants. In many cases, this collaboration was between the school system and the local or state vocational rehabilitation agency. In particular, the experiences of the California, Mississippi and

Maryland projects provide useful lessons on efforts related to establishing effective collaborations between these two systems.

The California YTD project, Bridges to Youth Self-Sufficiency (led by the California Department of Rehabilitation (CDOR), introduced linkages between the CDOR and local high schools by building upon two existing youth transition programs, CDOR's Transition Partnership Project (TPP) and WorkAbility I (WAI), a California Department of Education (CDOE) program. Both programs offer a range of pre-employment services and are intended to complement one another. Youth may choose to enroll in either program or both, though participation in these programs was not a requirement for enrollment in Bridges. The Bridges model enhanced the services currently available for youth in transition by providing funding for a dedicated benefits planner who assisted the youth in understanding the benefits they were entitled to and how employment may affect eligibility, a service coordinator responsible for ensuring that the youth had access to needed services, and a project director. This partnership proved successful in that Bridges not only provided stronger linkages between school and vocational rehabilitation, it also provided a variety of employment-related services, family supports, benefits counseling, and other services to participants.

There were several factors that facilitated the successful partnership of CDOR and CDOE in implementing and operating Bridges. The first and most likely significant factor was that these two agencies had a history of collaboration prior to Bridges: because youth could simultaneously participate in TPP and WAI, staff from CDOR and CDOE would work together on occasion when serving youth who had enrolled in both programs. Second, through its work with TPP, CDOR had prior experience working with the YTD target population. It is unusual for a state vocational rehabilitation agency to operate comprehensive youth transition programs such as TPP because the education system typically provides youth transition services, allowing vocational rehabilitation to focus on serving adults. This prior experience with youth was useful in implementing Bridges because CDOR did not need to build new capacity in serving youth in transition. Third, because Bridges was designed as an enhancement to existing programs, there was an existing infrastructure for providing services. This likely avoided some of the turf issues that can be encountered when two systems that typically do not work together partner on an initiative. Finally, during its tenure, Bridges had the benefit of strong lead management from CDOR. Management was able to strike the balance between respecting individual program nuances and approaches while holding each program accountable for delivering on the overall project goals and objectives.

The Mississippi Youth Transition Innovations (MYTI) project provides another clear example of the benefit of strong collaborative partnerships. MYTI, led by the Mississippi Department of Rehabilitation Services (MDRS), relied on partnerships with the Mississippi State Department of Education (MDE), the participating school districts, the Arc of Mississippi, and the Gulf Coast Workforce Board and Gulf Coast Business Services Corporation, which is the Gulfport One-Stop Center. In addition, MYTI engaged the services of a consultant from Mark Gold and Associates (MGA), a nationally recognized network of training consultants specializing in employment and community participation for those with significant disabilities, who was responsible for providing training to participating teachers and project staff, and for monitoring program fidelity to the model.

In practice, MYTI was highly collaborative. Various partners met regularly to ensure that program services were being delivered as planned. The consultant from MGA conducted regular trainings with teachers and provided follow-up when needed, and MYTI staff worked closely with teachers and regularly met with the One-Stop navigator to ensure that they were working together

to meet the goals of participants. In addition, senior managers from MDRS met regularly with administrators from the participating school districts to maintain a high level of engagement.

Evidence of effective collaboration existed throughout MYTI's tenure as a YTD project. In addition to working closely with all the partners to re-implement the program in the wake of Hurricane Katrina despite formidable challenges, MYTI was the only original YTD project that was able to implement Individual Development Accounts (IDA's) at scale. MYTI engaged national partners including the National Cooperative Bank Development Corporation and the Assets for Independence, a Federal program administered by the Office of Community Services within the Administration for Children and Families of the U.S. Department of Health and Human Services in order to establish the IDA program component. Developing an IDA program also required that project staff engage with various community partners at the local level. For example, MYTI partnered with the People's Bank for IDA savings and with Mercy Housing and Human Development, Inc. to work with youth interested in home ownership. The combination of partners afforded establishment of the IDA component to help youth with disabilities receiving SSI benefits enter the economic mainstream. Each IDA was opened to help youth achieve one of three goals: to attend school; to buy a home; or to start a business. Earnings deposited in the IDA were matched at \$4 for every \$1 deposited. For purposes of SSI, the money accumulated in an IDA is not counted when determining eligibility for SSA, and the earnings deposited in an IDA during a month are not counted when determining the SSI benefit amount. Ultimately, 13 YTD youth participated in MYTI's IDA component.

The Maryland YTD program provides a contrasting example of partnership. In Maryland, Project Transition (headed by the Maryland State Department of Education, or MSDE) sought to expand opportunities for in-school youth to obtain needed services as they prepared to transition into adulthood. One method to promote independence was to integrate expanded vocational rehabilitation services into the transition process for youth as young as 14 years. In Maryland, youth typically do not gain access to vocational rehabilitation services until the latter part of their junior year of high school and this connection with vocational rehabilitation is not usually formed directly through the school. In order to facilitate a linkage between the two systems that had not previously existed, the YTD project brought a Division of Rehabilitation Services (DORS) counselor into the partner schools to accelerate a participant's connection with vocational rehabilitation services, allowing access to employment supports provided by the vocational rehabilitation counselor.

In concept, MDSE and the state vocational rehabilitation agency believed that Project Transition would allow these two typically disconnected systems to more effectively work together to provide seamless services to youth, but in practice inconsistent communication at the senior management level between the partner organizations led to confusion about the service delivery responsibilities of front-line staff. Information gathered during field visits suggested that many of the services being delivered by Project Transition staff duplicated services that were supposed to be provided by vocational rehabilitation counselors or focused primarily on case management rather than direct service delivery resulting in youth receiving inconsistent services.

Conclusion: Developing effective partnerships is important when implementing youth transition programs. The three projects described above sought to link vocational and educational services to provide more effective services to youth in transition. Two were able to successfully do so, leading to youth receiving services from both agencies. The third was less successful in developing an effective partnership, resulting in inconsistent service delivery to participating youth.

Lesson 2: Bold initiatives to bring about systems change entail high risk.

The implementation experiences of Smart Start, the YTD model developed in Iowa provides a good example of the challenges of launching creative, ambitious programs and the importance of adequate planning. As described earlier, a core component of Smart Start relied on blending the funding or resources that participants already qualify for to create individual spending accounts which the youth and/or family could control. By cashing out services from the multiple sources for which a participant qualifies, the funds could be deposited into personal accounts and Smart Start could assist participants to purchase individually tailored services to help them achieve their education and employment goals. Enhanced IEP's would detail how these funds would be used for services. The qualifying service programs or agencies with funding to cash out included a wide range of entities such as the Department of Education, the Department of Labor, vocational rehabilitation, and the Department of Human Services (Medicaid).

Cashing out and blending funding sources had been attempted in other demonstration projects, but such models are complex and difficult to implement. For example, in a presentation sponsored by the National Technical Assistance and Research Leadership Center, one of the presenters noted that his discussion on funding options would focus "...on braiding strategies since most states do not have collaborative options to blend funds for people with significant disabilities into single self-directed accounts".¹⁰ Nonetheless, Smart Start's plan attracted a great deal of attention and there was evidence of a high level of initial buy-in across a wide range of stakeholders, particularly some that would not typically partner to deliver services.

On the ground, however, the challenges associated with implementing such a bold initiative became apparent. In order to cash out funds from the various public services, Smart Start staff proposed seeking approval for seven waivers in addition to those approved by SSA. Successful implementation also required the cooperation of state and federal agencies because they would be required to cede control of their program funding to another entity. In addition, the Office of Management and Budget (OMB) had to approve many facets of the program.

Given all these logistical challenges, Smart Start was never fully implemented. There was little doubt that the idea to cash out funds from various public services was an appealing approach. However, a review of program documents, as well as discussions with others familiar with the model suggested that though the ideas behind the intervention were bold and innovative, the plan itself was lacking in specificity. Moreover, Smart Start staff lacked the experience in effectuating state waiver authority to direct funds to individuals for the purchase of services in the community. In the absence of the state waiver to cash out funds, there was no way to implement individual spending accounts. Finally, there was little evidence of a well developed approach for ensuring that the disparate programs, and the agencies that provided the funding for those programs, would come together in a way that could lead to successful implementation.

By the third year (2005-2006) of the cooperative agreement, the blended funding component of Smart Start had not been implemented; of the 70 youth that had been enrolled, only half received any services but none had developed a personal budget. A reason cited by project partners for the unsuccessful implementation of the blending of funds was that Smart Start management had failed

¹⁰Presentation by Robert B. Nicholas, Ph.D.

to take into account the concerns of the various entities involved. For example, the Department of Education was unwilling to cede control of services that would be tied to a youth's IEP because it would be legally obligated to provide such services once they were added to the IEP. Already concerned about their obligations to provide such services, the Department of Education was especially unwilling to commit given that the funding support from other agencies had not yet been obtained by Smart Start. Similarly, the vocational rehabilitation agency was unwilling to have another entity determine how VR funding would be spent. Because Smart Start managers initially assumed that these entities would willingly participate in the project, there wasn't much of a focus on marketing the benefits of participation to the other agencies or an attempt to elicit their buy-in.

Close out interviews with the Iowa team suggested that the original design was overly ambitious and that, in retrospect, it might have been better to have developed project components that were less ambitious to make implementation more realistic. Staff also noted that they would have made the model more consumer-oriented, with a focus on job development and work experiences, which would have moved it away from focusing on changing systems. These and other factors prompted SSA to terminate funding for Smart Start in the fourth year of the project's cooperative agreement.

Conclusion: Systems change approaches focused on blending funding sources are difficult to successfully implement. The Iowa YTD project's experience suggests that attempts to blend funding into a single source require a high-level of cooperation and buy-in among many different agencies that may have competing goals. Though highly appealing in principle, such approaches may be overly ambitious within a limited timeframe and without significant support across all funding agencies.

Lesson 3: There are advantages and limitations to operating youth programs on a small scale.

The Mississippi Youth Transition Innovations (MYTI) provides important lessons on both the advantages and limitations of implementing boutique programs, which are programs that operate on a relatively small scale. As discussed earlier, MYTI provided services to 197 youth through September 30, 2008, the fifth year of operations.¹¹ MYTI provided training to classroom teachers who agreed to participate in the demonstration; program services were delivered to participating youth by the specially trained classroom teachers, with support from transition specialists, a benefits specialist, a VR counselor, and a One-Stop navigator.

By design, the intensive nature of program services required that a relatively small number of youth be served during the program's tenure. The number of program slots was tightly controlled to ensure that available staff could effectively serve enrolled youth. An advantage to limiting the number of youth served was that this equipped the program to address the needs of severely disabled youth by allowing staff to deliver highly individualized services. For example, staff worked with youth to develop individualized portfolios that demonstrated the youths' interest and skills and they spent a significant amount of time customizing jobs for individual youth. MYTI made a point of selecting some of the most severely disabled youth into intensive services because the program staff felt that such youth would benefit the most from what the project had to offer. In fact, in early

¹¹University of Southern Mississippi Institute for Disability Studies. 2009. Mississippi Model Youth Transition Innovation (MYTI) Evaluation Report Year 5 (September 30, 2007–September 29, 2008).

discussions about potential participation in a national random assignment evaluation, program managers felt that scaling up to meet the sample size demands of a random assignment evaluation would necessitate broadening the project's target population, which might compromise its core services.

Another significant advantage to remaining relatively small was that the manageable size made the program better able to adapt effectively to external changes. This was best exemplified by MYTP's resilience in the aftermath of Hurricane Katrina. During a site visit conducted shortly after the disaster, project staff noted that many of the participants could not be located. Furthermore, it was clear to the site visit team that the project staff themselves had been significantly affected by the disaster. During that visit, the management team stated that they were developing a plan to get the project back on its feet and that implementing this plan would be their primary focus in the coming months. Within a year, the project was again operating at full capacity despite the numerous logistical challenges. Though the strong leadership team and dedicated staff deserve much of the credit, the fact that the program was relatively small in scale was also likely a factor in its ability to recover.

There are also several disadvantages to keeping programs such as MYTI relatively small. First, such programs tend to reach a small target population. Given the small number of program slots relative to the number of potentially eligible youth, the program could be and was very deliberate about which youth were selected into the project. A committee met to discuss each youth prior to the youth being accepted into MYTI. Second, small programs such as MYTI can be costly to implement widely. The low staff-to-youth ratio and the intensive nature of services are likely to make it cost prohibitive to operate such programs at a much larger scale. More importantly, replicating the MYTI intervention at a larger policy-relevant scale could undermine its strength of program intimacy.

Conclusion: Boutique programs that serve youth with disabilities have many appealing characteristics, but there may be some disadvantages to continuing to operate on a small scale. Transition projects that choose to serve a relatively small number of youth are better equipped to provide services to youth who have high service needs and can more easily adapt to significant changes in their service environment. However, such programs will inevitably cost more to operate and will only be able to serve a small proportion of the intended target population.

Lesson 4: Getting to scale often entails operating the same program in multiple, highly dispersed locations with different service environments, economic conditions, and population demographics. Such geographic dispersion can be successfully managed.

In order to move beyond the boutique nature of some youth programs, which serve only small numbers of youth, it is often necessary to expand into additional service areas that may differ in terms of their local service environments, economics, culture, and population demographics. In order to successfully implement and maintain such programs, it is important to have strong management at the overall project level and at the local level. There must also be mechanisms for facilitating effective communication within and among multiple sites.

The California project provides useful lessons on how a program can be effectively managed in multiple sites to achieve common goals. California Bridges operated in four school districts in southern California (in the area surrounding Los Angeles), and one district in northern California. The project was centrally managed by the CDOR agency in Sacramento. Strong central leadership provided by the CDOR project director was instrumental to its successful implementation. The

project director had frequent periodic check-ins with each site via telephone and in-person and was easily accessible to project staff outside of those check-in meetings. She also arranged cross-site group interactions to discuss overall project successes and challenges. More importantly, she was viewed as a champion of the project, ensuring that key stakeholders throughout the state were aware of the project's existence and accomplishments. Although the director served as the overall project head, each individual project also had a local project leader who set the tone and direction of the implementation locally. This local leadership met with CDOR leadership regularly.

In addition to developing a leadership infrastructure to support program activities, CDOR created a state steering committee and local advisory committees within each participating locality. For example, in Vallejo, the advisory committee was composed of selected members from the Solano County Mayors Committee for the Employment of People with Disabilities and in Irvine/Newport Mesa, the Ocean County Adult Transition Task Force served as the advisory committee. Advisory committees met regularly and were asked to provide feedback and guidance as programs were implemented and operated. This not only ensured that all partners were fully informed about project activities, but it also provided communities with a sense they had a stake in the project.

Fidelity to the program model was also an important focus for CDORS, given the decentralized structure of the project. In order to ensure that project services were being delivered as intended, a centralized MIS was created to track project services, and a local evaluation partner was hired to oversee report generation so that all project staff were kept informed of achievements and shortcomings. In addition, the project created a website that allowed sites to see the status of the intervention; key documents were also stored on the website so that they were accessible to site staff. It seems likely that the combination of these approaches helped lessen the challenges associated with having project staff so physically disconnected from managers and peers.

Similar to Bridges, the MYTI program, though relatively small, operated in several counties in the Gulfport, Mississippi region and was managed by the state vocational rehabilitation agency out of Jackson, more than 150 miles away. Again, strong central leadership was instrumental in effectively managing this decentralized project. Though MDRS was officially the lead agency, and there was an MDRS project director with overall responsibility for the project, MDRS recognized the importance of leadership at the local level. Therefore, they engaged a consultant with extensive background in providing transition services, particularly employment services, to youth who was responsible for overseeing day-to-day operations locally. She worked closely with project staff, provided training and technical assistance, and ensured fidelity to the program model and adherence to the program implementation schedule. She was frequently on-site, allowing her to more effectively work with staff.

Conclusion: It is feasible to successfully manage youth transition programs that operate in multiple sites. In scaling up a program so that it moves from serving a relatively small number of youth to serving a broader cross-section of its target population, it is often necessary to operate the program in multiple locations. As evidenced by the experience of the two YTD projects described above, a key to successfully managing multiple project sites is a strong management structure with an effective project director. In addition, effective communication mechanisms are critical.

Lesson 5: To ensure a consistent focus on program goals, intervention components should be clearly defined and linked to measurable outcomes, which should be monitored.

Clearly defined intervention components not only provide a roadmap for program managers and staff when rolling out a program, but can also facilitate determining whether implementation is successful. Experienced program operators recognize that implementing interventions is easier said than done; having well-documented components and a clear work plan provides a mechanism for comparing concept to reality. In the case of YTD, each participating project was required to submit a comprehensive proposal that articulated the proposed program components and implementation plan.

Though important, clearly articulated components in the absence of clearly defined project goals and target outcomes can be problematic. What are the goals of the program? How do the components tie to those goals? Is there a logic model or theory of change that ties the two together? By clearly defining the relationship between components and outcomes, key stakeholders including program managers, service delivery staff, and partners are more likely to understand the importance of each program component.

Finally, establishing benchmarks as early as possible to ensure that outcomes are being achieved provides for two important supports. First, it allows all parties involved to maintain accountability. This ensures that service delivery staff and partners have a clear sense of what they need to achieve in order to be considered successful and allows management to determine whether staff are meeting stated goals. Second, by establishing benchmarks and measuring the achievement of those outcomes, program operators and managers are better able to demonstrate that the intervention is achieving the goals it set out to achieve. This can be important in an era of diminished funding and tightening budgets.

Central to the applications submitted to SSA for program funding, every YTD project established goals it would target through its services. For example, the California Bridges project established an employment goal: improve employment and education outcomes of transition age youth (ages 14 through 25) who are recipients of public benefits or at risk of becoming recipients.¹² The Bridges team identified specific outcomes that would be assessed to determine if goals were being met. For example, the CDOR application for a YTD project listed the following employment outcomes that would be measured:

- Paid and unpaid work experience (work history)
- Full-time competitive employment
- Part-time employment
- Sustained employment for 90 days or longer
- Supported employment
- Employment achieved matches employment goal or will lead to goal
- Career advancement

¹²California Department of Rehabilitation application for a YTD project

Using information from the extensive project database that it had developed to track outcomes, the Bridges project tracked statistics, including key outcomes like those listed above, allowing project management and staff to assess progress made and areas for improvement that should be targeted. In addition, a report presenting key statistics was posted on their project website on a monthly basis, allowing any interested party to assess what the project had achieved.

MYTI had a similar focus on outcomes and benchmarks. Their application identified specific long-term employment outcomes¹³:

- Full-time competitive employment
- Part-time employment
- Self-employment
- Supported employment
- Sustained employment
- Career advancement

MYTI management worked to develop an MIS to track outcomes; however, there were delays in building and rolling out the MIS. Nonetheless, management believed tracking outcomes was such an integral component to the success of the project that outcomes were tracked and summarized manually until the MIS had been completed. This allowed project management to gauge successful implementation of the program and identify technical assistance needs.

On the other hand, the Iowa YTD project was not as focused on articulating specific, measurable outcomes. The Iowa application to SSA notes the following goal among others: Improved secondary and post-secondary education and transition results, in terms of both employment and economic self-sufficiency, for students with disabilities or who are at risk of unemployment or under-employment.¹⁴ Although these are important goals, they are expressed less concretely than the Bridges and MYTI objectives outlined above. As noted earlier, the Iowa intervention could be characterized as a systems change project rather than an intervention focused primarily on direct service delivery to participating youth. The philosophical difference between these two intervention approaches emerged in Iowa's description of targeted outcomes and how outcomes associated with established goals would be tracked. Iowa's application focused primarily on the tasks and efforts associated with trying to meet the systems change objectives (for example, design a local transition model to be implemented in two project model sites; develop program integration strategies that achieve shared responsibility and joint accountability across systems; develop credit union strategy for deposit of student-centered funds) rather than the services that would be delivered to achieve improved outcomes. When service delivery was described in the application, it was primarily framed around staff duties.

Moreover, the outcomes described in Iowa's application were non-specific and difficult to quantify. For example, the application noted the following employment-related outcome: increased

¹³Mississippi Department of Rehabilitation Services application for a YTD project

¹⁴ University of Iowa application for a YTD project

employment rates of youth with disabilities leaving the educational system.¹⁵ It also described in detail the data sources that would be used to measure outcomes, but there was very little focus on specific outcome measures (for example, the percentage of youth obtaining full-time employment, the percentage of youth obtaining a high school diploma, the percentage of youth enrolling in post secondary education, and such). Though consistent with the nature of systems change grants, the lack of specific, measurable outcomes, aside from recruitment and enrollment numbers, made it more difficult for project managers to cite tangible evidence of success or progress.

Similar to Iowa, the original concept for the Erie 1 BOCES intervention focused heavily on changing systems and approaches, rather than directly focusing on affecting measurable outcomes. The three objectives outlined in the Erie application were as follows:

1. Implement an integrated transition system for youth 14-25 that results in improved employment for young people with severe disabilities through a collaborative partnership of federal, state and local agencies and schools.
2. Identify and document the supports and services necessary for students with severe disabilities to experience a seamless transition to the post-school world of work, postsecondary education, and independent living.
3. Develop support materials for staff development and project operations that facilitate replication of effective practices to other locations.¹⁶

The Erie application did describe short-term outcomes that it planned to measure to determine whether their efforts were successful. As described in the application, the outcomes included:

- Process measures include completion of certain key documents that are key to acquiring or accessing services, skills, resources and supports that contribute to transition outcomes, i.e., completed person-centered transition planning, New York State Career Plan; vocational assessment, Career and Technical Education courses of study, Individualized Education Program (IEP) content includes transition goals and objectives for in-school youth, completed Individualized Plan for Employment (IPE).
- Measures of school success, including: grades, attendance, statewide test scores, credits towards graduation.
- Indicators of involvement in capacity-building activities such as community-based work, community and postsecondary education experiences, internships, employment, enrollment in postsecondary education.¹⁷

However, there was not a clear link between the Erie project's components and the proposed outcomes, especially given that the project planned to provide supports and classroom-based career exploration rather than directly identify real world work experiences. The plan originally was to subcontract for job developers rather than include them on the project staff. This plan called for the

¹⁵University of Iowa application for a YTD project

¹⁶Erie 1 BOCES application for a YTD project

¹⁷Erie 1 BOCES application for a YTD project

use of mini-grants to fund job development services for youth once school staff had identified specific work experience needs for students. This raised concerns in the evaluation team's early work with the site as to whether the program had the potential to produce impacts in a random assignment evaluation. The program model was subsequently modified to focus on more direct service provision that was directly linked to key transition outcomes such as employment.

Conclusion: Metrics matter when implementing programs targeted to youth in transition. Providing key stakeholders and project staff with a clear sense of what outcomes will be tracked to monitor successful project implementation, how such outcomes will be tracked, and then actively monitoring associated benchmarks ensures that all parties have a clear sense of the goals of the intervention. It also facilitates the project's ability to demonstrate success. Conversely, the absence of clearly defined target outcomes or not clearly tying outcomes to program components can lead to questions around the effectiveness of the program for participants.

Lesson 6: The provision of support services such as case management, benefits planning, and self determination, in the absence of the direct provision of employment services is unlikely to yield measurable outcomes.

Prior research has suggested that the provision of support services alone is not likely to yield significant self-sufficiency outcomes such as increased earnings due to employment and reductions in benefits receipt. For example, in their evaluation of the State Partnership Initiative (SPI) intervention, Peikes, et al. (2005) found that though the provision of benefits planning services resulted in higher rates of employment, it did not result in increased earnings. The researchers suggested that the benefits planning services may have resulted in participants deliberately keeping earnings below a certain amount to ensure that their benefits were not terminated. In addition, several random assignment studies, including findings from the Transitional Employment Training Demonstration (TETD) and the Structured Training and Employment Transitional Services (STETS), suggest that the provision of direct employment supports (transitional employment supports in the cases of TETD and STETS) led to improved employment outcomes for youth with disabilities (Kerachsky and Thornton 1987; Decker and Thornton 1995; Thornton 2003).

In addition to these research findings, an extensive review of research and best practices conducted by the National Collaborative on Workforce and Disability for Youth (NCWD/Y) led to the development of the Guideposts for Success. These guideposts were intended to be used by practitioners and policymakers in creating interventions that optimized service delivery for youth with disabilities. One of the five areas specifically focused on career preparation and work-based experiences.

Though it is not possible to determine whether any of the original YTD intervention designs led to employment impacts, the findings discussed above suggest that support services alone, in the absence of direct employment services, are unlikely to achieve strong self-sufficiency outcomes. Below, the Colorado and Erie projects, two of the original YTD models that focused primarily on support services or case management that facilitated access to services, are discussed. In both

instances, the interventions were subsequently modified to allow for more of a direct employment focus prior to participation in the national evaluation.¹⁸

Core strategies proposed by Erie County New York, according to the project narrative submitted to SSA, “...include redesigning current communication and collaborative practices among key agencies, enhancing case coordination and management, increasing support to families and schools regarding benefits planning and providing increased flexibility in the use of work incentive waivers.”¹⁹ Early work with the site team reinforced the notion that Erie’s proposed approach focused on support services rather than more direct employment services, such as job development. For example, researchers learned that Erie’s original design included a binder building workshop, which helped them to organize the paperwork required for transition services, and familiarized them with the adult service system, allowing for the development of self-directed IEP’s, an important facet of youth empowerment. Employment services primarily consisted of classroom-based career exploration, which would include such activities as classroom assignments and field trips, but there wasn’t a strong focus on developing real-world job experiences for the youth. Recognizing the limitations of this approach in leading to strong employment outcomes, Erie 1 BOCES worked with evaluation and technical assistance staff to redesign the intervention to become more employment focused.

Colorado Youth Wins (CYW), in its original application, noted that there would be a dedicated staff person focused on career services. The career counselor would “provide youth and their families with individualized, client-driven career planning services” and would “have skills similar to a rehabilitation counselor”.²⁰ Though services such as assistance with resume writing, vocational evaluations, and career assessments and plans to address assistive technology needs were cited, the provision of direct employment referral and placement services would be done by other Workforce Center staff. Early site visits led the research team to conclude that the CYW model was primarily focused on delivering intensive case management and other support services. Subsequent discussions with program management emphasized the importance of providing direct employment services to participating youth, which was consistent with best practices. CYW management agreed with this in principle.²¹

In both instances, the provision of direct employment-related services such as job development was not a primary focus of the program intervention, yet independence and self-sufficiency were cited as primary goals. Clearly defined pathways that would suggest that the proposed services could directly lead to self-sufficiency were not evident. This, coupled with available findings from studies of services targeted to similar populations as well as best practices in the field, suggested that it was unlikely that either model as originally conceived would likely lead to significant impacts on employment and earnings.

¹⁸As noted earlier, process analysis data obtained once programs moved on to the national evaluation were not included in this analysis. Discussions related to modifying both of these program models took place during the early site reconnaissance work prior to their official inclusion in the national evaluation.

¹⁹Erie 1 BOCES application for a YTD project

²⁰Colorado WIN Partners/University of Colorado Denver application for a YTD project

²¹Once CYW joined the national evaluation, changes were eventually made to their program model that allowed career counselors to provide more direct job development services to youth.

Conclusion: Providing direct employment services to participating youth are more likely to lead to changes in self-sufficiency outcomes. Some youth transition program models primarily focus on support services and classroom-based training, and opt to refer youth to other agencies for direct employment-related services. Research and practice suggest that this approach may not lead to significant economic outcomes for youth. Instead, an approach that provides support services, including case management and benefits planning and advisement, coupled with proactive employment services, such as job development and placement in work experiences may provide youth with the skills and experience required to become self-sufficient.

IV. CONCLUSION

The YTD project was an ambitious effort funded by SSA to address the challenges faced by youth with disabilities as they make the transition into adulthood. Through an RFA, SSA awarded cooperative agreements to seven projects across the country to implement projects targeted to youth ages 14 to 25 (and in one project, youth as young as 10) who were either on the disability rolls or would soon be at risk of going on to the rolls.

Two of the seven original YTD projects operated for the full five-year period funded through the cooperative agreement, plus an additional year via a no-cost extension, while another two terminated program services early for various reasons. The remaining three projects were selected into the YTD random assignment evaluation that was subsequently funded by SSA.

Each of the YTD projects shared common goals of improved educational and employment outcomes and reduced reliance on disability benefits for participating youth, though they featured a wide range of service delivery approaches and program components. In addition, there was diversity among the projects in terms of geography, project size, lead organization, and staffing structure. The diversity among the projects provided an opportunity to explore some of the factors that lead to the successful implementation of youth transition programs. That exploration was the basis for this report.

Based on information obtained through interactions with the seven original YTD projects, as well as a review of early project documents, six lessons emerged that may help guide policymakers and program administrators in developing and funding interventions intended to serve youth with disabilities making the transition from school into adulthood. It should be noted that for the three sites that were subsequently selected to participate in the random assignment evaluation, information used in this report was limited to their pre-random assignment or pilot experiences.

The six lessons speak to the importance partners can play in successful service delivery, how factors such as the size or scale of the program should be considered and addressed when implementing programs and why developing mechanisms for establishing, measuring, and monitoring outcomes matter. The lessons also explored how service delivery approaches, whether they are targeted to changing systems or to delivering services directly to youth, have the potential to affect successful implementation and ultimately youth outcomes.

This is the only YTD evaluation report that provides information on the experiences of the original seven YTD projects. Work continues on the random assignment evaluation. Each of the six random assignment projects, including the three projects that were part of the original cooperative agreements with SSA, will participate in a comprehensive process analysis focused on implementation experiences during the random assignment evaluation. The results of the process analysis will be presented in forthcoming project-specific reports that will also present interim impacts of the projects on youth outcomes. Those reports will be published over the next two years.

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APPENDIX A

USE OF SSA WORK INCENTIVES AND WAIVERS

This appendix documents the use of SSA work incentives and YTD waivers by participants in the seven original YTD projects who received either SSI or SSDI benefits. The estimates, which are based on SSA administrative extracts of summary measures that were developed by SSA programmers, represent cumulative use of waivers and work incentives from September 30, 2003 through September 29, 2008.^{1 2} In total, there were 1,101 youth participants at these sites, 699 (64 percent) of whom received SSA benefits (“YTD SSA beneficiaries”). Our waiver estimates reflect the usage by the 699 YTD SSA beneficiaries in these sites given that non-beneficiaries could not use the SSA waivers.

Of the 699 YTD SSA beneficiaries across the seven projects, 353 (50 percent) used some type of SSA work incentive or waiver. There was substantial variation in overall work incentive and waiver usage across projects, as well as in the use of specific work incentives, such as the student earned income exclusion. This variation was expected because waiver use varied for each youth depending on the amount of earnings, school attendance, and meeting or not meeting disability eligibility requirements for benefits. Youth consented to participate in the study on any given day prior to December 2007; therefore, there was also variation in the length of time the SSA work incentive or waiver applied. From the consent date through the end of the study, youth had an average period of 3 yrs and 10 months to use the waivers. The waivers were designed to reassure youth who receive benefits and their families that they could participate actively in the YTD without jeopardizing their cash payments or healthcare. While YTD project staff provided the youth employment services and other supports, SSA applied the waivers when applicable to help the youth transition to self-sufficiency. The waivers were intended to encourage youth who receive benefits to work and save.

A. YTD Waivers Expand Five Existing SSA Work Incentives

An important element of YTD is the modification for project participants of selected SSA program rules (often called work incentives), which are described in detailed in the Social Security Administration’s *Red Book*.³ These modifications, or waivers, expand five existing SSA incentives to work and pursue activities that foster long-term independence, such as education, training, and rehabilitation programs. The first four waivers detailed below apply to SSI beneficiaries only and the fifth applies to SSI and SSDI beneficiaries.

- **Student Earned Income Exclusion (SEIE).** Before applying the earned income exclusion, SSA disregards a student beneficiary’s earnings, subject to inflation-adjusted monthly and annual caps. Normally, the SEIE applies only to students who are age 21 or younger, but for YTD participants the age limit is waived. In 2006, SSA disregarded up to \$1,460 per month of a student’s earnings, subject to a cap of \$5,910 for the year.⁴
- **Individual Development Accounts (IDAs).** Funds deposited in qualified IDAs, along with interest generated by those funds, are excluded from SSI countable income. The

¹ Federal Register / Vol. 68, No. 194

² We are grateful to Christa Bucks and Steve Fear of SSA for producing these extracts for our research team.

³ See the *Red Book* at www.socialsecurity.gov/redbook for more information on the work incentives.

⁴ We focus on 2006 because all seven of the original YTD projects were operating in that year and much of the data that are the basis for this analysis pertain to that year.

funds accumulated in the account are not counted when determining eligibility for SSI. For YTD participants, the qualification criteria have been expanded to include a wider range of savings objectives, as well as IDAs that do not receive federal matching funds.⁵

- **Earned Income Exclusion (EIE).** For all SSI recipients who work, SSA disregards \$65 plus half of any earnings over that amount per month when calculating countable income to determine the benefit amount.⁶ But under the EIE waiver, SSA disregards \$65 plus three-fourths of any additional earnings by YTD participants.
- **Plan for Achieving Self-Support (PASS).** For YTD participants, SSA has expanded the allowable goals for a PASS beyond direct employment goals to include postsecondary education and career exploration. Funds used to pursue the plan are excluded from SSI countable income.
- **Continuing Disability Review (CDR) or Age 18 Medical Redetermination.** Under existing rules (“Section 301”) for SSI and other Social Security disability benefits including SSDI, the termination of disability benefits because of a negative determination from a CDR or age 18 medical redetermination is delayed so long as a beneficiary is participating in any of certain kinds of programs designed to promote self-sufficiency, including a research demonstration project such as the YTD, and SSA determines that continued participation will make the individual less likely to need disability benefits in the future. Normally, SSA makes this determination on a case-by-case basis. Under the waiver, SSA assumes that continued YTD participation will make all YTD participants less likely to need disability benefits in the future. This is the only waiver that applies to both SSI and SSDI beneficiaries.

B. Implementing the SSA Waivers for YTD

Youth are eligible for the SSA waivers if they sign a consent form agreeing to participate in a YTD project and then actually begin participating. When a youth begins participating, the waivers become effective as of the date of consent. The YTD projects notify SSA about the consents and the benefits are adjusted accordingly at SSA field offices.

⁵ For each dollar of earnings the account holder deposits, a participating non-profit organization sets aside a matching contribution of 50 cents to four dollars (the average is one dollar). In IDA programs that involve federal funds, a federal match also is set aside. Federally funded IDAs must be used to help buy a home, pay for post-secondary education, or start a small business. All IDA participants undergo financial literacy training. Under the current rules, Social Security deducts account holder deposits from countable earned income and disregards matching deposits, IDA account balances, and any interest earned by the account when it determines SSI eligibility for someone who has a federally funded IDA. For YTD participants, these disregards also apply to IDAs that do not involve federal funds, including IDAs that may be used for purposes other than the purchase of a home, postsecondary education, or business start-up. The IDA may be part of an existing state or local program or a program established by a YTD project for its participants.

⁶ For SSI beneficiaries, the EIE is applied after the general income exclusion (GIE), which excludes the initial \$20 of monthly income from any source (earned or unearned). Thus, under standard SSI rules, a youth with no unearned income could exclude the initial \$85 of monthly earnings (\$20 under the GIE and \$65 under the EIE) plus half of any earnings in excess of \$65. Under the SSA waivers for YTD, this youth could exclude \$85 of monthly earnings plus three-fourths of earnings in excess of \$65.

The SSA waivers are implemented as part of the monthly benefit calculation, which also includes other SSA work incentives (e.g., impairment related work expenses). In Table A1, we present an example of an SSI benefits calculation sheet. As shown in the worksheet, there is a prescribed sequence of exclusion of earnings under SSA’s work incentives for SSI beneficiaries: (1) SEIE, (2) IDA deposits, (3) EIE, and (4) PASS.

As we will show in more detail below, the use of SSA work incentives and waivers depends on each YTD project’s caseload composition, programmatic emphasis, and number of working youth. In general, all youth who have earnings above \$85 qualify for the EIE, though some beneficiaries might not need the EIE if they have all their earnings disregarded under another work incentive (e.g., the SEIE). Projects that emphasize continuing education or serve large numbers of in-school youth who work will have higher utilization of the standard SEIE work incentive and/or the SEIE waiver. While the PASS and IDA waivers provide generous work incentives, the use of these waivers is generally more limited because youth must go through a relatively lengthy application process to obtain SSA approval for a PASS and, in the case of an IDA, through an application process at a bank that offers an IDA. Finally, projects that have a large SSI population nearing age 18, such as CUNY, are likely to have more participants making use of the waiver pertaining to negative CDRs and age-18 medical redeterminations.

C. Descriptive Findings for the Original YTD PROJECTS

This section presents descriptive statistics on the use of SSA work incentives and waivers by youth who participated in the original YTD projects. The statistics are based on data provided by SSA from its program administrative files. The statistics are cumulative over five years. In Table A2, we summarize the percent of YTD participants in each site who were SSA beneficiaries and, hence, eligible for the waivers. In Table A3 we summarize participant usage of the five categories of work incentives and waivers described above. For the EIE and CDR incentives, we do not distinguish between the use of the standard work incentive and the use of the corresponding waiver, given the nature of these provisions.⁷ In Table A4, we provide more insights into the types of waivers most commonly used by repeating the analysis in Table A2 for the subgroup of participants who used a waiver.

1. The Majority of YTD Participants Were SSA Beneficiaries

In total, there were 1,101 YTD participants, 699 of whom received benefits (64 percent) and hence, were eligible for the waivers (Table A2). The concentration of SSA beneficiaries in each site ranged from 51 percent (Iowa) to 80 percent (Colorado and CUNY). The remainder of the analysis below focuses on the 699 YTD SSA beneficiaries.

⁷ In both cases, it was not possible to distinguish between work incentive use under existing rules and waiver use in YTD. For example, for the EIE, the 3 for 4 provisions replaced the original 1 for 2 earnings disregards. In the case of the CDR (Section 301), it was not possible to distinguish between youth who were eligible for the waiver because of their participation in YTD and youth who were eligible for the standard work incentive under existing rules (e.g., participation in Vocational Rehabilitation). It is not possible to accurately measure the costs of waiver use from the non-random assignment sites without the unrealistic assumption that the waivers had no impact on employment choices.

2. Half of YTD SSA Beneficiaries Used At Least One Work Incentive or Waiver

Just over 50 percent of YTD SSA beneficiaries in the original YTD projects used at least one work incentive or waiver (Table A3). These estimates are heavily influenced by the disproportionate share of YTD SSA beneficiaries in the California project, which accounted for over half of the original YTD SSA beneficiaries. The use of any work incentive or waiver closely mirrors the number of youth who had positive earnings (44 percent) both overall and across the projects. This relationship between positive earnings and waiver use is not surprising given that the only waiver for which earnings are not a prerequisite is the Section 301 waiver, which was used relatively infrequently (7 percent).

3. YTD SSA Beneficiaries Most Commonly Used the EIE and the SEIE Work Incentives

Among all YTD SSA beneficiaries in the original YTD projects, the EIE (27 percent) and SEIE standard work incentive (24 percent) were the most commonly used incentives or waivers (Table A3). The SEIE waiver and Section 301 waivers the next most frequently used (10 and 7 percent, respectively). The IDA work incentives and the PASS work incentive and waiver were each used by less than 5 percent of participants; the IDA waiver was not used at all.

4. Use of Any Work Incentive or Waiver Varied By Project

Across the original YTD projects, the use of any work incentive or waiver varied considerably, ranging from 25 percent to 73 percent (Table A3). At least 45 percent of participants in the California project and the Colorado, CUNY, and Erie pilot projects used one or more work incentives or waivers. Usage rates were substantially lower among participants in the Iowa, Maryland, and Mississippi projects (33, 25, and 39 percent, respectively). This lower usage is a reflection of the relatively small proportions of youth in these three projects who reported positive earnings to SSA.

5. Additional Project-Specific Findings

Table A4 presents rates of use of individual work incentives and waivers among YTD participants who used any work incentive or waiver. Here we highlight key findings from the table for specific projects.

- Participants in the California project used all of the work incentives and waivers, except the IDA waiver. Among the 207 California participants who used any work incentive or waiver, the EIE (68 percent), SEIE work incentive (44 percent), and SEIE waiver (28 percent) were used most commonly. Four percent of these youth also used the PASS work incentive and the CDR provisions. One participant used the IDA work incentive. The extensive use of the SEIE is noteworthy because of the emphasis on promoting education opportunities in the California project. The large use of the EIE is also of note because it reflects larger earning levels.
- Participants in the Mississippi project used all of the work incentives and waivers, except for the PASS and the IDA waiver. The EIE (55 percent), SEIE work incentive (39 percent), IDA work incentive (52 percent), CDR provisions (23 percent), and SEIE waiver (10 percent) were the most commonly used work incentives and waivers among the 31 participants in this project who used any work incentive or waiver. The program

model for the Mississippi project emphasized asset development and was the only project in which participants made extensive use of the IDA work incentive.

- Participants in the CUNY project used all of the work incentives and waivers, except for the IDA and PASS work incentives and waivers. The SEIE work incentive (63 percent) and CDR work incentive (35 percent) were the most commonly used work incentives and waivers used among the 51 participants in the project who used any waiver or work incentive. This project primarily served youth who were ages of 17 and 18, which likely explains the high use of the SEIE and CDR provisions. The large use of SEIE is also of note because it reflects participation in summer employment, which was central to the CUNY project.
- Participants in the Maryland project used all of the work incentives and waivers, except for the IDA work incentive and waiver, the PASS waiver, and the SEIE waiver. The SEIE work incentive (44 percent) and CDR work incentive (52 percent) were the most commonly used work incentives and waivers among the 25 participants in the project who used any waiver or work incentive. This project primarily served youth who were in high school, which likely explains the high use of the SEIE and CDR provisions.
- The Iowa, Colorado and Erie projects had enrollments of 36 or fewer YTD SSA beneficiaries per site (see Table A3), which led to limited pools of potential users of the work incentives and waivers.

Table A1. Example of SSI Calculation Sheet for YTD Participants

| Step | Calculations |
|--|--------------|
| Unearned Income | |
| General Income Exclusion (GIE) | - |
| Countable Unearned Income | = |
| <hr/> | |
| Gross Earned Income | |
| Student Earned Income Exclusion (SEIE) | - |
| Remainder | |
| IDA Contribution | - |
| Remainder | |
| GIE (if not used above) | - |
| Remainder | |
| \$65 Earnings Exclusion | - |
| Remainder | |
| Impairment Related Work Expense (IRWE) | - |
| Remainder | |
| Multiply by 0.75 (\$3 for \$4 Exclusion for EIE) | X 0.75 |
| Remainder | |
| Blind Work Expenses (BWE) | - |
| Total Countable Earned Income | = |
| <hr/> | |
| Total Countable Unearned Income | |
| Total Countable Earned Income | + |
| PASS Deduction | - |
| Total Countable Income | = |
| <hr/> | |
| Base SSI Rate (FBR or VTR) | |
| Total Countable Income | - |
| Adjusted SSI Payment | = |
| <hr/> | |
| Adjusted SSI Payment | |
| Gross earned income received | + |
| Gross unearned income received | + |
| Pass, BWE or IRWE expenses, IDA contributions | - |
| Total Financial Outcome | = |

Source: Benefit Calculator Developed by Becca Smith, Ray Cebula and Dale Verstegan

Table A2. Percent of Participants in the Original YTD Projects Who Received SSA benefits From 2003-2008

| YTD Project | Participant Sample Size (N) | Number of YTD SSA Beneficiaries (N) | Participants who Were SSA Beneficiaries (%) |
|--|-----------------------------|-------------------------------------|---|
| Original Projects | | | |
| California | 504 | 358 | 71.0 |
| Iowa | 70 | 36 | 51.4 |
| Maryland | 167 | 99 | 59.3 |
| Mississippi | 197 | 80 | 40.6 |
| Original Projects (Pilot Operations Only) | | | |
| Colorado | 30 | 24 | 80.0 |
| CUNY | 87 | 70 | 80.5 |
| Erie | 46 | 32 | 69.6 |
| Totals | 1,101 | 699 | 63.5 |

Source: Calculations based on SSA administrative extracts on waiver and work incentive usage

Table A3. Percent of Participants in the Original YTD Projects Who Used SSA Work Incentives and Waivers From 2003-2008

| YTD Project | YTD SSA Beneficiaries Sample Size (N) | Had Positive Earnings (%) | Any Work Incentive/Waiver Use (%) | SEIE Work Incentive (%) | SEIE Waiver (%) | IDA Work Incentive (%) | IDA Waiver (%) | EIE (%) | PASS Work Incentive (%) | PASS Waiver (%) | Section 301 (CDR) (%) |
|--|---------------------------------------|---------------------------|-----------------------------------|-------------------------|-----------------|------------------------|----------------|-------------|-------------------------|-----------------|-----------------------|
| Original Projects | | | | | | | | | | | |
| California | 358 | 56.1 | 57.8 | 25.7 | 16.2 | 0.3 | 0.0 | 39.4 | 2.2 | 0.3 | 2.2 |
| Iowa | 36 | 33.3 | 33.3 | 22.2 | 5.6 | 0.0 | 0.0 | 11.1 | 11.1 | 2.8 | 0.0 |
| Maryland | 99 | 13.1 | 25.3 | 11.1 | 0.0 | 0.0 | 0.0 | 2.0 | 1.0 | 0.0 | 13.1 |
| Mississippi | 80 | 30.0 | 38.8 | 15.0 | 3.8 | 20.0 | 0.0 | 21.3 | 0.0 | 0.0 | 8.8 |
| Original Projects (Pilot Operations Only) | | | | | | | | | | | |
| Colorado | 24 | 45.8 | 50.0 | 4.2 | 25.0 | 4.2 | 0.0 | 41.7 | 8.3 | 0.0 | 4.2 |
| CUNY | 70 | 47.1 | 72.9 | 45.7 | 1.4 | 0.0 | 0.0 | 12.9 | 0.0 | 0.0 | 25.7 |
| Erie | 32 | 43.8 | 46.9 | 25.0 | 9.4 | 0.0 | 0.0 | 18.8 | 0.0 | 0.0 | 6.3 |
| Totals | 699 | 44.1 | 50.5 | 23.5 | 10.4 | 2.6 | 0.0 | 27.0 | 2.1 | 0.3 | 7.0 |

Source: Calculations based on SSA administrative extracts on waiver and work incentive usage

Table A4. Rates of Use of Specific Work Incentives and Waivers Among YTD Participants Who Used Any Work Incentive or Waiver From 2003-2008

| YTD Project | Any Work Incentive/ Waiver Use (N) | SEIE Work Incentive (%) | SEIE Waiver (%) | IDA Work Incentive (%) | IDA Waiver (%) | EIE (%) | PASS Work Incentive (%) | PASS Waiver (%) | Section 301 (CDR) (%) |
|--|------------------------------------|-------------------------|-----------------|------------------------|----------------|-------------|-------------------------|-----------------|-----------------------|
| Original Projects | | | | | | | | | |
| California | 207 | 44.4 | 28.0 | 0.5 | 0.0 | 68.1 | 3.9 | 0.5 | 3.9 |
| Iowa | 12 | 66.7 | 16.7 | 0.0 | 0.0 | 33.3 | 33.3 | 8.3 | 0.0 |
| Maryland | 25 | 44.0 | 0.0 | 0.0 | 0.0 | 8.0 | 4.0 | 0.0 | 52.0 |
| Mississippi | 31 | 38.7 | 9.7 | 51.6 | 0.0 | 54.8 | 0.0 | 0.0 | 22.6 |
| Original Projects (Pilot Operations Only) | | | | | | | | | |
| Colorado | 12 | 8.3 | 50.0 | 8.3 | 0.0 | 83.3 | 16.7 | 0.0 | 8.3 |
| CUNY | 51 | 62.7 | 2.0 | 0.0 | 0.0 | 17.6 | 0.0 | 0.0 | 35.3 |
| Erie | 15 | 53.3 | 20.0 | 0.0 | 0.0 | 40.0 | 0.0 | 0.0 | 13.3 |
| Totals | 353 | 46.5 | 20.7 | 5.1 | 0.0 | 53.5 | 4.2 | 0.6 | 13.9 |

Source: Calculations based on SSA administrative extracts on waiver and work incentive usage

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