



# New York **Makes Work Pay**

Developing a path to employment for New Yorkers with disabilities

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## Medicaid Infrastructure Grant (MIG) Brief

### Impact: Asset Accumulation and Financial Literacy

February 2011

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New York Makes Work Pay is a Comprehensive Employment System Medicaid Infrastructure Grant (#1QACMS030318) from the U.S. Department of Health and Human Services, Centers for Medicare and Medicaid Services (CMS) to the Office of Mental Health on behalf of New York State. It is a joint effort of the Burton Blatt Institute at Syracuse University and the Employment and Disability Institute at Cornell University with the collaborative support of the Employment Committee of the New York State Most Integrated Setting Coordinating Council (MISCC) to develop pathways and remove obstacles to employment for New Yorkers with disabilities.

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## Impact: Asset Accumulation and Financial Literacy\*

*\*note that all outcomes indicated are based upon an actual implementation timetable of 13 months over the 2009-2010 contract years given contractual delays*

Building upon 10 CE regional learning communities implemented by BBI and its experts during 2009 and continued in 2010, CE principles and practices are being introduced and replicated as tools to increase employment access and outcomes for people with disabilities, especially those with complex needs. CE pilot projects initially developed in 2009 in Hempstead and Utica, NY were replicated in other NYS locations, augmented by deployment of mentors trained in CE techniques are demonstrating validity of the approach. Specific outcomes directly attributable to MIG training and technical assistance includes:

- Creation/use of interagency Advisory Group comprised of state disability agency staff from OPWDD, DOL, VESID, CBVH and OASAS to guide and improve utilization of CE practices for clientele served by their agencies
- *Expansion of statewide training locations:* 4 training sites serving NYC/L.I., Mohawk Valley, Central NY and the Finger Lakes
- *Number of staff trained:* 101 (Hempstead=50, New York City=39, Mohawk Valley=7, CNY=15)
- *Number of people using CE:* (Hempstead=20, New York City=30)
- *Number of people obtaining jobs using CE:* 8 (Hempstead=2, New York City=5, Mohawk Valley=1)
- Development of a CE Mentorship network that lays the foundation for CE distance learning Certification and follow-along training and technical assistance in 2011
- Work with State Agency Advisory Group to embed 'Discovery' as alternative assessment in state funded employment programs
- Added CE as a stage 2 category in the integrated agency employment (OSOS) database and as a component of the 2011 data base training program for employment program providers
- Cross-state information exchange with the S10 state southeast TACE to exchange best practices for implementing CE
- Growing evidence of cost-effectiveness for people who have not had employment success/had multiple attempts in the past (*For example: A person closed successfully in Sept. had 3 prior unsuccessful experiences in the system. This time VESID paid for 127 hrs of CE over a 4-month period @ a cost of \$5,493 compared to the most recent unsuccessful SE experience (330 hrs over 4½yrs) costing \$13,500.*)

BBI led the implementation of a unique statewide community based partnership design to improve access by people with diverse disabilities to financial literacy and asset accumulation resources. The intent from the onset has been to avoid duplication with existing community initiatives already addressing poverty and asset accumulation and improve their capacity and the capacity of disability services providers to make use of and enhance current capacity through a Communities of Practices model (COP). COPs are engaged through United Way of New York State and local United Ways lead the initiative with one or more designated disability

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partners. The overall intent of the project is to increase outreach to the disability community to achieve a 10% increase in Earned Income Tax Credit utilization.

The impact and outcomes of this initiative are presented below:

### **YEAR 1 Asset Communities**

Albany – United Way of the Greater Capitol Region / Wildwood Programs, Inc.

Buffalo – United Way of Buffalo / Western NY Independent Living, Inc.

Ithaca – United Way of Tompkins County / Challenge

Rochester – United Way of Rochester / Empire Justice Center

Utica – United Way of the Valley & Greater Utica Area / RCIL

Wellsville - United Way of Allegany County / Allegany ARC

### **YEAR 2 Asset Communities**

Long Island – United Way of Long Island / Health & Welfare Council of Long Island

Syracuse – United Way of Central New York / P.E.A.C.E Inc.

Westchester – United Way of Westchester & Putnam Counties

- Sustainable community based models of collaboration were developed with United Way, financial institutions, government agencies, disability provider and advocacy groups, and asset building organizations in each of the above 9 communities.
- Free tax filing assistance and use of EITC and other favorable tax provisions was provided for over 10,750 individuals with disabilities
- Resulted in over \$5 million in economic impact for persons with disabilities with tax refunds and 353 bank accounts opened.
- 200 individual referrals were made to financial literacy education programs and over 25 individuals with disabilities participating in matched savings programs
- Asset Forums were held in six communities statewide with over 300 local stakeholders.
- Over 500 individuals with disabilities participated in training activities in the targeted communities to learn more about diverse asset building strategies to encourage return to work and savings.
- Three new pilot sites in Syracuse, Westchester County, and Long Island
- Identifying and documenting accessible paths to self-sufficiency
  - Barriers, Solutions, Agency collaboration, Results related to enhanced employment and economic status
- We expect 10% increase in access to EITC and tax refunds.
  - Final numbers will be available June 2011
- We collaborated with Office of State Comptroller (OSC) to establish a disability section of “Your Money New York “website and continue to provide content.

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- The initiative is currently developing a statewide work group with NYSRA and NYAPRS and twenty other statewide provider and advocacy groups.
- Continued training events involve over 300 participants in five selected communities
- The project was successful in using the 2-1-1 call centers operated by United Way to increase MBI-WPD enrollment.
- These call centers have responded to over 1,800 inquiries and assisted with information and appropriate referrals
- The project is using 2-1-1 as a financial helpline with referrals to benefits planners and free tax assistance sites

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