

**DIRECTORATE FOR EDUCATION  
EDUCATION POLICY COMMITTEE**

**Group of National Experts on Special Needs Education**

**CASE STUDIES: CALIFORNIA BRIDGES TO YOUTH SELF-SUFFICIENCY**

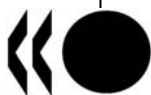
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*The Group of National Experts on Special Needs Education last met in 2008. However, the remaining outputs of the project "Pathways for Disabled Students to Tertiary Education and Employment" continue to be given this reference to maintain coherence to previous material produced by the Group.*

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## California Bridges to Youth Self Sufficiency

**Introduction**

The California (CA) Bridges to Youth Self Sufficiency project (Bridges) was one of several projects in the Social Security Administration's (SSA) Youth Transition Demonstration (YTD). These 10 projects, located in eight states, developed services to help youth with disabilities successfully transition into adulthood.<sup>1</sup> Each YTD project was different, but all were designed to improve educational and work outcomes for participants. They generally targeted youth between the ages of 14 to 25 who were either receiving or at risk of receiving Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI).<sup>2</sup>

Many youth with disabilities, especially youth who receive or are at-risk of receiving benefits from Social Security, need assistance as they transition into adulthood. Upon completing secondary education, they face an abrupt end to any publicly provided entitlement services they received through the education system. They are often not prepared to access adult services, such as Vocational Rehabilitation or One Stop Center<sup>3</sup> services, which are often disjointed from educational entitlements.<sup>4</sup> If they begin higher education, they must identify themselves as having a disability, provide documentation of their disability, and request personal accommodations and services, often for the first time.<sup>5</sup> The YTD projects were designed to go beyond linking the fragmented support system currently in place. These projects addressed low expectations about employment and self-sufficiency from the individual, family, and society.

Approximately 775,000 young people aged 14-25 receive SSI.<sup>6</sup> There are approximately 1.9 million SSI recipients under age 30. Most will remain fully dependent on SSI for the rest of their lives if they do not receive supports and services that will enable them to join the workforce. Rupp and Scott conservatively estimated that the average length of time a youth will remain on SSI is 27 years.<sup>7</sup> The current cost in SSI benefit outlays to these youth is approximately \$350 million a month, or \$4.2 billion a year.<sup>8</sup>

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<sup>1</sup> See Martinez et al. (The Social Security Administration's Youth Transition Demonstration Projects: Implementation Lessons from the Original Projects, November 2, 2009) for information on the other YTD sites.

<sup>2</sup> SSI is a means-tested cash transfer program for the elderly and individuals with disabilities. SSDI is an insurance program for individuals with disabilities and their dependents. The definitions of disability for adults are the same for SSI and SSDI: The individual must have a medically determinable disability that is expected to last (or has lasted) at least 12 continuous months or to result in death and prevents him or her from doing any substantial gainful activity. If under 18 (for SSI), rather than the substantial gainful activity requirement, the disability must result in marked and severe functional limitations. To receive SSDI benefits, an individual must be insured by achieving a certain level of earnings called quarters of coverage or be the dependent of someone who has achieved enough quarters or coverage. There is no work-history requirement for SSI.

<sup>3</sup> One Stop Service Centers are centralized places where employers and job seekers have access to workforce services.

<sup>4</sup> In the U.S., most youth are eligible for a variety of education-based disability services as long as they are under age 22 and have not yet received a high-school diploma.

<sup>5</sup> GAO Higher Education and Disability October 2009.

<sup>6</sup> SSI Annual Statistical Report, 2007, SSA

<sup>7</sup> Rupp, Kalman and Charles G. Scott. 1995. Length of Stay on the Supplemental Security Income Disability Program. *Social Security Bulletin* 58(1): 29-47.

<sup>8</sup> Supplemental Security Record, April 2007, SSA

One of the most significant barriers to work that many youth who receive SSI face is misinformation. Their families and information sources (often, their teachers) mistakenly believe that the poverty they know is better than the poverty and lack of healthcare coverage they may face if they go to work and lose their benefits. This mistaken belief turns many parents and teachers into gatekeepers who direct young SSI recipients away from work. A goal of the YTD projects is to empower youth and their families by providing the skills and knowledge necessary to achieve independence and self-sufficiency. Once youth gain greater independence and self-sufficiency they become less reliant on services such as SSI, Medicare, or Medicaid, thus lowering public costs.

For YTD participants who were SSA beneficiaries, certain SSA rules were modified to allow them to retain more of their earnings, invest in their future, and maintain their benefits longer as an incentive to earn and save. See Appendix Table 1 for a full description of the policy changes. These waivers included: (1) removing the age limit for using the student earned income exclusion (SEIE) work incentive; (2) increasing the SSI's earnings disregard from \$1 for every \$2 earned over \$65 to \$3 for every \$4 earned over \$65; (3) increasing the types of goals allowed as a Plan to Achieve Self Support (PASS); (4) increasing the types of accounts and purposes for Individual Development Accounts (IDAs); and (5) allowing cash and medical benefits to continue despite an adverse medical continuing disability review or age-18 medical redetermination until the youth has finished participating in YTD.<sup>910</sup>

Like all the YTD projects, Bridges' goal was to increase the self-sufficiency of transition-age youth with disabilities. This goal, which may not be realized until many years after participation in Bridges, may take the form of increased employment and decreased dependence on public benefits, as well as an improved quality of life. Bridges promoted the use of a coordinated system to provide youth and their families with services and supports to help them achieve these goals.

CA Bridges served 504 youth from December 2003 to September 2009. This report provides an overview of the Bridges project and provides information on some key outcomes of interest, highlighting the experiences of five youth who successfully completed the program. The information in this paper is drawn from two primary sources. First, the management information system used by Bridges staff to record their efforts with participating youth and the resulting outcomes provided aggregate information on the participants profiles and services received. Second, interviews with staff, partners, and youth provided rich sources of information on the stories of representative youth.

## **Bridges Organization**

Bridges began as a research project funded by the SSA and the California Department of Rehabilitation (CDOR). The two key positions for this project were the benefits counselor and service coordinator. The benefits counselor educated participants and their families on disability benefits from Social Security and other public benefits, use of the YTD waivers, and the effect of earnings on their monthly SSI or SSDI

<sup>9</sup> See Martinez et al. (The Social Security Administration's Youth Transition Demonstration Projects: Profiles of the Random Assignment Projects, December 11, 2008) for more information on these waivers. See [www.socialsecurity.gov/redbook](http://www.socialsecurity.gov/redbook) for other SSA work incentives.

<sup>10</sup> U.S. law requires that Social Security look at cases from time to time to make sure that beneficiaries getting payments should still get them and are getting the right amount. Medical continuing disability reviews are conducted in accordance with section 221(i) or section 1614(a)(3)(H) of the Social Security Act (the Act.) An age-18 medical redetermination is conducted in accordance with section 1614(a)(3)(I) of the Act. Public Law 96-265 (Social Security Disability Amendments of 1980) provides that, even though a beneficiary is found to no longer be medically eligible for benefits, benefits may continue if: the beneficiary is participating in any of certain programs; and SSA determines that continued participation will increase the likelihood that the individual will remain off the disability rolls permanently once benefits stop.

payment. The service coordinator provided information on school-based and adult services to assist participants in lining up the needed support services for success in school and work. Additionally, a local project manager monitored project activities, conducted the bi-monthly local advisory meetings, and facilitated local partnership with agencies, community organizations, and local businesses. Bridges operated in seven school district sites chosen to reflect the geographic, industrial, cultural, ethnic, and socioeconomic diversity of California. The seven school districts were:

- Vallejo City Unified School District
- Riverside County Office of Education
- Whittier Union High School District
- Capistrano Unified School District/Saddleback Valley Unified School District Consortium
- Irvine Unified School District/Newport-Mesa Unified School District Consortium

A state-level steering committee comprised of the project managers and CDOR administration and other organizations with an emphasis on transition guided the project and provided an arena for collaboration and information sharing. The committee included representatives from the CA Department of Rehabilitation; the CA regional Social Security office; the CA Department of Education; the CA Department of Employment Development; the Governor's Committee on Employment of People with Disabilities; the Department of Developmental Services; the Department of Mental Health; CA Community College Chancellor's Office; CA Workforce Investment Board; Regional Centers; World Institute on Disability; and the Department of Health and Social Services. The committee met two times per year to provide oversight, evaluate progress, and offer additional suggestions for collaboration. The committee also helped with state-level system changes necessary for a successful intervention.

Given Bridge's organization within the school system, they primarily recruited youth from the local school districts, although referrals from community partners were also important. The focus of the Bridges project was to provide participants and their parent/caregivers with the services and information to go to work, to use work incentives, and ultimately, to decrease their reliance on benefits.

Priority was given to participants with multiple disabilities and/or barriers to employment. Outreach was initiated to youth in and out of school, in the foster care system, in the juvenile justice system, and from diverse cultural backgrounds. Youth and their families received letters inviting them to attend an orientation workshop offering information on Social Security work incentives. Youth and their family/caregivers also received reassurance that Bridges staff would respond and advocate as needed with Social Security, employers, community providers, and public agencies.

### **Bridges Services**

The Bridges project included interventions designed to help youth "pursue their interests, goals, and dreams while living a happy and productive life." Specifically, Bridges promoted self-sufficiency (personal and financial), employment (full-time, part-time, and volunteer), and life quality (relationships and community participation) by providing interventions designed to positively affect the individual, their family, and their community. The Bridges service delivery model emphasized self-determined goals, high expectations, a positive vision of the future, collaborative partnerships, and self-advocacy skills.

While all YTD sites provided employment and benefit planning services, CA Bridges focused on:

- Work incentive/benefit advisement
- Person-centered planning/early intervention
- Job development and placement
- Intensive service coordination

These services built upon existing transition initiatives which covered the range of ages of youth eligible to participate in Bridges. SSA provided funding to CDOR to administer the project. CDOR partnered with California Department of Education, local school districts, and local SSA field offices where project sites were located to assure the proper services were delivered. The Bridges benefits counselor and/or services coordinator at each site coordinated (or delivered) needed services. This was accomplished through individual meetings and training workshops planned around the schedule of youth participants and their families. During workshops on SSA work incentives, participants learned to manage a calendar and filing system to track letters and report earnings to Social Security.

In response to a need by youth and their families or caregivers to better organize services and identify additional needed services, benefit counselors and /or service coordinators developed an individualized “action plan” for each participant. This dynamic plan documented all the needed services for the youth. Over time, this helped the youth and their family to coordinate current and upcoming services on their own.

Locating Bridges in the schools allowed participants to stay connected with career and job development programs offered through the schools. When a participant was not receiving services from CDOR, the participant could have received job placement services through the Workability I program<sup>11</sup> and continue to receive all Bridges services. Youth with mild, moderate, and severe disabilities ages 12 to 14 enrolled in middle school who have an individualized education plan (IEP) are eligible for the Workability I program. This program, administered by individual school districts and the California Department of Education, focuses on pre-employment skills development, career awareness, and planning for high school. Youth ages 14 to 19, who are enrolled in high school and who have an IEP, are eligible for a similar high school program in CA that emphasizes employment and explores independent living skills. In collaboration with CDOR, CA Work Investment Board (CWIB)/One Stop Centers, local employers, and local colleges, youth receive career exploration services, work readiness skills, work-based learning opportunities, paid and unpaid internships, entry-level employment, transition planning, and follow-up services.

Students with moderate and severe disabilities in their last two years of high school who are CDOR consumers are also eligible for the Transition Partnership Project (TPP)<sup>12</sup> administered by the school districts and the CDOR. The TPP program works with city governments, regional centers, public transportation, adult service providers, community college Disabled Students Programs and Supports at community colleges, CWIB/One Stop Centers, and employers to provide career planning and employment services for youth in and out of school interested in working. These youth also receive additional career services coordinated with CDOR including career assessment, career planning, job-specific skills training, work-site evaluations, job coaching, specialized job development, and job placement and follow-up to ensure employment retention.<sup>13</sup>

Bridges provided training and coordination with several other CDOR Programs. They included Workability II, III, and IV for individuals who are age 19 and over with moderate and severe disabilities. These adult programs extend the Workability I model and serve Regional Center<sup>14</sup> clients. The programs are run by the school districts or colleges in partnership with CDOR and focus on transition planning with

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<sup>11</sup> Workability I is funded through the CA Department of Education and is available to all students until they exit from school.

<sup>12</sup> Transition Partnership Project is funded by CDOR.

<sup>13</sup> Students can concurrently enroll in the Workability I and TPP programs.

<sup>14</sup> Regional Centers are private, nonprofit corporations that “provide or coordinate services and supports for individuals with developmental disabilities.” <http://www.dds.cahwnet.gov/RC/Home.cfm> (accessed December 4, 2009).

an emphasis on employment and independent living. Youth may receive a combination of modified education through adult schools, regional occupational programs,<sup>15</sup> colleges, community-based instruction, work-site training, transportation and mobility skills, independent living skills, job coaching, and Americans with Disabilities Act (ADA) accommodation information and provision.

Bridges staff helped coordinate these and other transition services, such as health care services, for eligible youth. They coordinated benefits and services, held benefits planning (SSI/SSDI) workshops, helped youth with their person-centered planning/Bridges action plan, helped to establish family support networks, mentored youth, and held community stake-holder training. The services were implemented uniformly across all seven sites.

The Bridges project model incorporated systems linkage into their services. Cross-agency collaboration enabled them to meet the diverse service needs of participants. Bridges staff identified the building of partner relationship with community providers as the key to intensive service coordination. At community locations, Bridges staff delivered training and information specifically designed to share knowledge and skills and foster long-standing collaborative partnerships. Benefits counselors and service coordinators successfully completed the Community Work Incentive Coordinator's (CWIC) training from an SSA contractor which ensures they understood and could effectively counsel individuals regarding SSA work incentives. Having this knowledge was useful in building relationships throughout the community. Community service providers were particularly interested in meeting with Bridges staff to learn about benefits planning and how to apply SSA work incentive rules.

This training was also useful for dealing directly with SSA staff, who participated in outreach meetings and quarterly meetings for the project. A key to the link with the local SSA field office was the active participation of SSA's Area Work Incentive Coordinator (AWIC) who assisted Bridges staff with technical and operational questions.<sup>16</sup> Field office staff reported that Bridges' staff were very knowledgeable regarding SSI and SSDI program rules. They also reported that participants were more confident, more knowledgeable regarding SSI rules, and more independent compared with previous contacts with these youth.

### **Basic Statistics**

The Bridges program served over 500 youth from 2003-2009.<sup>17</sup> The characteristics of these youth are presented in Table 1. Bridges served somewhat more males than females (55 vs. 45 percent). These youth were mostly white (48 percent) although there was a large minority of Latinos (26 percent) which is consistent with the demographics of the region. Almost thirty percent of the youth reported an intellectual disability as their primary disability (29 percent) and one quarter reported a specific learning disability. Most of the youth who consented to be in the program were between ages 17 and 19 at enrollment.<sup>18</sup> The school status of these youth is presented in Table 2. When they first entered the Bridges program, most youth were in school (80 percent) and about a fifth of the youth were out of school (20 percent). By the time youth exited Bridges, half of the youth were out of school (50 percent).

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<sup>15</sup> Regional Occupational Programs are public education programs that provide hands-on career preparation and skill training for particular jobs. See <http://www.carocp.org> for more information.

<sup>16</sup> AWICs are SSA employees who oversee work incentive activities in a region.

<sup>17</sup> Only the 504 youth who had an SSA-verified Social Security Number and received services from Bridges are included in this report.

<sup>18</sup> Although most YTD projects are limited to youth ages 14 to 25, the earliest projects, of which CA is one, served a broader age range.

Among youth whose detailed status was known when they entered Bridges, most were in school (Table 2); over 55 percent were attending school exclusively and an additional 25 percent were participating in some form of work activity. As of their last quarter of involvement with Bridges, over half (55 percent) were participating in a work activity.

Over 30 percent of youth had attended community college by the end of the project. A small percentage (1.4 percent) had also attended a 4-year institution, which is consistent with the age range and focus of the Bridges program on helping youth receive age-appropriate supports that may one day enable the youth to be self-sufficient.

While participating in Bridges, youth received a variety of services (Table 3). Among the 81 percent of youth who received one of 11 specific services identified in the data, the most common service provided was job training (78 percent), followed by pre-vocational training (70 percent), living skills (69 percent), and job placement services (59 percent). However, many youth received other services ranging from legal aid (2 percent) to on-the-job support (47 percent).

Although Bridges was one of the few YTD sites to serve youth at risk of receiving Social Security benefits, the majority of youth who participated in Bridges were SSA beneficiaries (Table 4). Almost half (48 percent) received SSI payments in the month they consented to be in the Bridges program and 9 percent were SSDI beneficiaries; 4 percent received SSI and SSDI concurrently.<sup>19</sup> At the end of the program, over two-thirds of Bridges' participants were SSA beneficiaries. This is driven by a 10 percentage point increase in the number of individuals qualifying for SSDI worker benefits and a 15 percentage point increase in the number receiving SSI. It is not possible to say whether the growth in the percentage receiving benefits would have been greater or smaller in the absence of the Bridges program. This increase is, however, consistent with an increase in SSI participation at age 18 when SSA stops counting parental income in determining financial eligibility, making it easier to meet the financial criteria for SSI eligibility. Additionally, the increase in SSDI worker benefits means these youth were working enough to qualify for benefits on their own record, as opposed to their parents.

Over 60 percent of Bridges youth had earnings in the years following their enrollment in Bridges (Table 5). Although this peaks in the first year of participation in Bridges (69 percent), the sample drops due to the staggered enrollment. This earnings profile is consistent with the age range and focus of the Bridges program. Four years after enrollment, almost half (47 percent) of youth received earnings above \$1020.<sup>20</sup> Among these youth, average earnings four years after enrollment were over \$9100.

Focusing only on Bridges participants who received SSI or SSDI benefits, over 56 percent reported earnings to SSA during their participation in Bridges (Table 6). Additionally, 55 percent used SSA's work

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<sup>19</sup> These statistics may include some youth who were not receiving SSI at the time of consent or at the end of the Bridges program but who had received it either before they participated or for some months while they were participating.

<sup>20</sup> The \$1020 threshold represents sum of the monthly earnings an individual can earn in a year, applying both the general (\$20) and earned (\$65) income exclusions in each of the 12 months, that can be disregarded under SSI program rules. Although SSI is a monthly program, extracts of earnings data are only available on a yearly basis. While this "annualized" amount does not correspond to any programmatic value, it provides a reference for the level of earnings received.

incentives or the YTD waivers. The most common waiver used was the 3-for-4 waiver (39.4 percent)<sup>21</sup>, although 42 percent used either the SEIE standard (26 percent) or the SEIE waiver (16 percent).<sup>22</sup>

### **User Views of Bridges**

Bridges conducted yearly surveys of customer satisfaction. Most parents were very pleased with Bridges services. Early on, parents reported that the workshops Bridges held gave them knowledge and provided a networking opportunity. However, they also indicated Bridges could improve in the following areas: providing more written information; reducing language barriers for individuals where English is their second language; avoiding scheduling barriers for parent workshops; and customizing services and supports for participants and parents as needed. Focus group studies also helped Bridges staff refine the project over time. Bridges staff worked hard to implement these changes, resulting in increased satisfaction with the project.

At exit interviews, participants and families indicated they were quite pleased with the services Bridges provided. Participants and families expressed that Bridges staff provided critical benefits planning services not available with most other service agencies, and that Bridges staff also offered greater individualized service coordination. Many parents initially expressed concern over their child's ability to succeed independently. One parent, for example, felt that his son was not ready for work or college. However, the Bridges program was effective in helping him work through his fears by providing assistance and counseling. Bridges staff identified the service components of public benefit information, community resource connections, job supports, and advocacy with SSA and service providers as a continuing need after the project ended.

In 2006, Bridges collected survey responses from service providers. Service providers responded that Bridges staff had positive attitudes and were helpful and responsive. Service providers indicated that Bridges staff were cooperative partners who understood and practiced teamwork and were knowledgeable of benefits and work incentives.

### **Case Studies**

The examples that follow illustrate how Bridges helped participants achieve educational and employment outcomes and reduced reliance on disability benefits for participating youth. Although all sites had successful participants, the highlighted youth come from either the Whittier or Irvine/Newport-Mesa sites.

#### ***Whittier Union High School District***

##### Inglibert

Inglibert, who has cerebral palsy, enrolled in Bridges at age 24. A recent high school graduate, Inglibert was unsuccessfully searching for a job. He came to the Employment Network (EN) part of the Whittier Union High School District because, as an SSI recipient, he had received a Ticket under the Ticket-to-Work program and hoped they could help him find a job.<sup>23</sup> Ultimately, the EN staff determined he was a good candidate for the Bridges project.

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<sup>21</sup> Instead of the benefit being reduced \$1 for every \$2 earned over \$65, the waiver provided a reduction of only \$1 for every \$4 earned over \$65.

<sup>22</sup> The SEIE allows SSA to disregard part of a working student's monthly earnings. The waiver removes the age limit for using the SEIE work incentive.

<sup>23</sup> The Ticket-to-Work program is a free, voluntary program for SSA beneficiaries with disabilities which provides a "Ticket" to the individual which he or she can assign to one of several approved organizations



Bridges staff met with Inglibert and his family to identify his interests and what skills he could bring to a job. During a person-centered planning session, Inglibert suggested he find a job that made use of his computer, organizational, and communication skills. To achieve these goals, Bridges provided benefit advisement, job development and placement, and intensive service coordination.

Bridges staff also helped Inglibert to find a job as a customer service representative at a closet design company. Job duties include receiving phone calls from customers who wish to order a product or schedule an appointment for a home renovation.

Bridges explained to Inglibert how work would affect his benefits and how to report wages to SSA. While he participated in Bridges, Inglibert used the \$3-for-\$4 waiver; as a result, his countable earnings were substantially reduced. Inglibert continued receiving benefits planning and employment services from Bridges staff after exiting the YTD program by assigning his Ticket to them as his EN in the Ticket-to-Work program.

Inglibert also attended a local community college. His course work included general education courses and courses in computer science. Inglibert identified a teleservice center position at SSA as a goal in a follow-up person-centered planning session.

### Tarek

Tarek, who has autism, enrolled in Bridges at age 18. During his senior year in high school, Tarek had no work experience and had never taken transportation without his family. While at school, Tarek was fully integrated into academic classes and extracurricular activities, including sports, drama, and choir.

Bridges staff provided Tarek and his family with a coordinated system to leverage services and supports to help him achieve his goals. Tarek and his family attended the workshop on SSI where he learned how SSA calculates his monthly payment amount and how he would independently report his wages to SSA.

While talking with Tarek's mother, Bridges staff gained insight on her perception of Tarek's future. She had the impression that Tarek would always be dependent on his family; she was fearful for him and how people would react to him in other settings including college and work. She purchased a house with the thought that Tarek would live in a separate room attached to the garage.

Tarek invited his friends and family to help him plan for his future. Bridges staff facilitated a person-centered planning meeting to inventory Tarek's interest and skills, set personal goals, and find a path to achieve his goals. In his plan, Tarek identified his dream to become a purser on a cruise ship. To achieve this goal, Tarek, Bridges, his family, and his friends identified the need for Tarek to gain independence in the community. Bridges staff provided Tarek with comprehensive travel training, including detailed training on using the bus.

Bridges also helped connect Tarek with tutors and advised him on his education. As Tarek began to move towards his dream job, Bridges staff encouraged Tarek to enroll in classes at local community college. After school, he worked for a clothing store. He also continued to be active in school activities. He starred in a production of Guys and Dolls, and he traveled with his classmates to New York City to sing at Carnegie Hall.

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(Employment Networks) that have agreed with SSA to provide employment services. The Employment Networks receive a payment from SSA when the beneficiary meets specific employment goals. More information can be found at: [www.socialsecurity.gov/aboutticket.html](http://www.socialsecurity.gov/aboutticket.html).

Tarek was excited about the prospect of working. Bridges staff looked for job positions matching Tarek's interest and skills. A local restaurant hired Tarek as a dish washer. The owner demonstrated interest from the start of Tarek's employment in working with Tarek on skills development. Tarek was soon recognized as a dependable employee and liked and accepted by other employees. In addition to working, Tarek also continued his education at a local community college by taking classes in financial planning.

The Bridges project made a large impact on Tarek and his family. In addition to helping Tarek take steps towards his career objective by providing independent-living skills and work experience, Bridges staff affected his family's conceptions of Tarek's abilities. In particular, his mother gained confidence in her son's ability to be competitively employed and to live independently.

### ***Irvine Unified School District/Newport-Mesa Unified School District Consortium***

#### **Brittany**

Brittany, who has Attention Deficit Hyperactivity Disorder (ADHD), enrolled in Bridges at age 14. She was sometimes overly active, had trouble paying attention, had difficulty controlling impulsive behavior, and did not always complete her assignments. This behavior resulted in poor grades in school. Through her person-centered plan and an on-line career assessment, Bridges staff helped Brittany identify her skills for a job and, eventually, get work experience in her desired field (social entrepreneurship) while going to school.

One of the first things Bridges staff helped Brittany understand was the need for her to improve her grades. At the suggestion of Bridges staff, Brittany joined a student study group and began getting extra help from the teacher on completing homework. As a result, her grades improved.

To prepare for life on her own, Brittany attended Bridges workshops on Social Security benefits and community service providers. Bridges staff connected Brittany to service providers such as the Orange County Transportation Authority, Irvine Valley College Disabled Students Programs and Services, the Department of Rehabilitation, Transition Partnership Program, and Projects with Industry. These providers offered Brittany transportation and academic assistance.

Brittany's on-line career assessment suggested an interest in children and animals. At different times in the year, Bridges staff helped Brittany find a variety of internships to allow her to further identify her work interest. She interned at a local non-profit organization, a fine arts center, an animal shelter, and community recreational park. During these internships she received a small stipend from the Bridges program. Bridges staff helped her to keep track of her work schedule, to interact with management, and to learn how to conduct herself in an interview. She went to work on time, and she learned how to appropriately communicate with her supervisors. She prepared for her future employment search by doing a few practice interviews with Bridges staff. After these internships, she was confident that she wanted to work with children.

After a successful summer internship, the supervisor of the fine arts center contacted her to interview for the community service assistant position setting up art activities for children, cleaning up after them at the end of the class, and preparing for the next day's activities. After interviewing with a three-person panel, she received the job. During the school year, she earned \$10 an hour and worked 19 hours per week; in the summer, she worked additional hours. She was well liked by her supervisor and co-workers.

Bridges continued to monitor her progress and provide her with guidance on accessing academic assistance and transportation training to help her as she worked and went to school. When Brittany reached age 18,

she decided not to apply for SSI benefits. Her mother, who had seen her daughter's progress at school and at work, agreed with this decision. As a single mother of two children with disabilities, Brittany's mother appreciated the help Bridges staff provided as she had little time to attend meetings, work, and other events. Although she was aware of Brittany's desire to find work, she had no time to help her look for a job.

Brittany took the initiative to register for general education classes at a local community college and independently arranged for tutoring and extended time on tests with the disability services office. Her grades were better in college than they had been in high school. She did well enough in her classes the first year that she began to plan for a transfer to a four-year college to study psychology or social ecology.

### Eunice

Eunice, who has chronic brain syndrome, enrolled in Bridges at age 17 in her junior year in high school. She experiences frequent headaches, facial pains, and low stamina affecting her physical and mental performance.

Prior to entering the Bridges program, Eunice had not sought out the services and supports she needed although she had been in the Workability program for some basic transition services. While there, she expressed a desire to become a teacher and live on her own. In order to reach this goal, she needed to learn to manage her own services and ask for accommodations that would allow her to be successful in high school and then college. Eunice took initiative and went to Bridges staff for help preparing for college and a career as a teacher. Additionally, she understood that there could be an impact on her SSI and Medicaid benefits and wanted to better understand these issues.

During her person-centered planning sessions with Bridges staff, Eunice demonstrated a desire to live independently and identified short-term goals for greater independence. While in high school, Bridges staff helped her to document her goals, the supports she needed to complete assignments and exams, and physical therapy sessions in her individualized education plan (IEP).

To help Eunice meet these goals, Bridges staff taught her how to use benefit planning tools to understand the effect of work and earnings on her SSI benefit. Her family attended the benefit workshops with her. Her parents told Bridges staff that they were comfortable if she did not have a career, although, they were willing to support her in whatever she wanted.

In her last year of high school, Bridges connected Eunice to the Irvine Career Link Program, which provided her with a work experience in her field of interest as a part-time assistant instructing kids at the childcare center operated by the Irvine School District. Eunice knew she liked kids but had never worked in a classroom. By blending together resources, the Bridges' service coordinator identified the work site and the employment and training funds from the Workforce Investment Act (WIA) to pay her a minimum hourly salary. While at work, Eunice was challenged to learn to work with other teachers and to be more self-determined. Her supervisors were very satisfied with Eunice's performance, and they saw her confidence increase. As a result of her involvement in the Irvine Career Link Program, Eunice successfully exited the CDOR system.

Eunice enrolled in Irvine Valley College upon receiving her high school diploma. With the help of Bridges staff, she learned to report her earnings and school status to Social Security. Social Security then excluded most, if not all, of her earnings each month, up to the maximum for the year under the student income exclusion. To further help Eunice in her transition, Bridges staff connected her to the Orange County Transportation Authority and helped her identify bus routes and receive monthly reduced-fare bus passes to get to school and work.

After completing her associate's degree, Eunice immediately enrolled at the University of California, Irvine. She met with the disability services office's staff to arrange for academic tutors and extended test time. She received her bachelor's degree in psychology and social behavior.

While a college student, Eunice continued to build her career and pay for school by working with pre-school children at the child care center. Her earnings increased to more than \$15 per hour. The earlier WIA position helped her to be comfortable with her work.

Eunice received her preliminary teaching credential and used that credential to work full-time as a substitute teacher in the Irvine Unified School District. Because of her earnings, her SSI payments stopped. Her future career plans included taking the additional courses necessary to receive a "clear" teaching credential.<sup>24</sup>

### Willie

Willie, who has Down syndrome, enrolled in Bridges at age 20. Willie and his mother met with Bridges staff to identify his interests and what skills he would bring to a job. At the person-centered planning meeting, Willie told Bridges staff that he wanted to work and to live in his own home.

Bridges staff connected Willie with a number of internship opportunities to increase his limited work experience. He interned at a retail store, a hotel, and a grocery store. Willie's employers found him to be a bright and capable employee.

Willie attended the Bridges' workshops as his schedule allowed. Bridges staff offered him tools to help him to report his earnings, keep his SSI benefit and related paperwork organized, and pay bills. At first, Bridges worked one-on-one with him to teach him to pay his own utility, rent, and cell phone bills and to use an ATM machine to make deposits and withdrawals from his personal checking account. He began to demonstrate general money management skills and tracked his own savings and checking accounts on-line. Eventually, Willie opened an IDA account with his earnings.

Bridges staff helped Willie obtain a full-time job at a grocery store. He quickly gained the support of his manager and co-workers and has remained successfully employed by the store for over four years. His job duties as a courtesy clerk include bagging groceries, retrieving shopping carts, and transporting products to their designated area. His employer described Willie as very personable and always willing to assist customers.

After starting his job at the grocery store, Bridges staff worked with Willie to identify bus routes and secure reduced-fare bus passes to get to work. In addition, Bridges staff helped Willie to access services needed to develop his independent living skills through the Orange County Regional Center. He applied for a subsidized housing voucher through the United States' Housing and Urban Development agency and was placed on a waiting list for that voucher. To help him achieve his goal of living on his own, Willie's parents helped him register in a low-income housing lottery in a new housing development with a mandated 10 percent low-income housing designation. With encouragement from the Bridges Project, Willie opened an IDA to save money towards a down payment on this home. Willie's parents were instrumental in assisting Willie to complete all of the financial planning and budgeting classes that were

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<sup>24</sup> To become a teacher in California, there is a two-level credentialing process. The first step is "preliminary." It requires specific knowledge requirements, coursework, and skills and lasts for 5 years. The second step, the "clear" credential, requires additional course work and experience.

required as part of the IDA funding process. In June 2007, Willie achieved his goal of moving into his own home.

### **Sustainability**

SSA's funding for Bridges as a YTD project ended in 2008.<sup>25</sup> Since then, Bridges staff has sought other funding to continue the services of the project. They identified several potential resources, applied for multiple grants, and took actions to insure that services continued. Several sites have also become private non-profit agencies to increase the scope of grants for which they are eligible to compete. Their efforts have included participation in the 2009 American Recovery & Reinvestment Act<sup>26</sup> Summer Youth Employment Program in partnership with the local Workforce Investment Boards.

Bridges' experience in the YTD project has encouraged five school districts in California to become ENs in the Ticket-to-Work program. The EN sites can serve youth age 18 and older. The income derived from being ENs enables the sites to sustain the additional activities without the need for additional funds from SSA. Career Connection, a part of the Whittier Union High School District, for example, has been an EN since 2003. After Bridges services ended, eight youth from Bridges applied their Ticket to Career Connection for additional employment supports at their former high school, which provided continuity in services and uninterrupted partnerships with educators.

The Irvine, Saddleback, and Capistrano school districts (as a consortium) and Whittier Union High School District have received Projects with Industry<sup>27</sup> grants that will enable them to continue to provide some services to Bridges participants. The Irvine, Saddleback, and Capistrano school districts have also applied for and received a U.S. Department of Transportation grant to facilitate transportation options in rural areas and at non-traditional public transportation hours.

As indicated earlier, many of the youth who participated in Bridges have mental health disabilities. Each of the sites has been able to expand their TPP programs to include benefits advisement and service coordination for youth with mental health conditions. Additionally, the sites are applying for further federal funds from the American Recovery and Reinvestment Act of 2009.

### **Preliminary Findings**

The Bridges project implemented a model of enhanced transition services along with the YTD waivers of SSA program rules to assist youth in achieving education and employment goals. Bridges staff directly provided over 80 percent of the youth participants with employment services along with service coordination and benefits planning. Between December 2003 to September 2009, Bridges staff provided the youth with: (1) the support to find and keep the job; (2) information on the myths and realities of employment and benefits from Social Security; and (3) a start at building the capacity for long-term, competitive employment. By September 2008, over 30 percent had attended college and more than half (57 percent) of the youth receiving SSI or SSDI benefits had reported earnings to SSA.

<sup>25</sup> Bridges operated under a no-cost extension through September 2009.

<sup>26</sup> The 2009 American Recovery and Reinvestment Act (PDF, H.R. 1, S. 1) is an economic stimulus package enacted by the 111th United States Congress and signed into law by President Barack Obama on February 17, 2009.

<sup>27</sup> Projects with Industry is a program in the U.S. Department of Education that provides grants for job development, placement, career advancement, and training for individuals with disabilities. See <http://www.ed.gov/programs/rsapwi/index.html> (last accessed December 4, 2009).<sup>27</sup> Include a source for information on PWI grants.

While the statistics suggest short-term achievements, it is too early for long-term findings. These short-term accomplishments of the Bridges youth may lead them, perhaps many years later, to leave (or remain off) SSI and/or SSDI benefits. SSA plans to follow YTD participants for a long period of time to see if there are lasting impacts on SSI or SSDI receipt and earnings. Over the next several years, SSA intends to publish reports on these short- and long-term impacts.

Several lessons learned so far from the YTD project reflect the extent to which the Bridges project was able to successfully implement the services. One lesson learned is that strong partnerships are instrumental to successfully serving youth in transition. The Bridges project built upon existing transition programs to demonstrate how a variety of services from multiple partners can effectively come together. A second lesson learned is that to ensure a consistent focus on program goals, intervention components should be clearly defined and linked to measurable outcomes, which should be monitored. At the outset of the Bridges project, staff used a management information system to record the demographics, services provided, and action plans for each youth; this allowed staff to gradually identify accomplishments. Finally, support services such as case management, benefits planning, and self-determination provided in conjunction with employment services are likely to result in successful employment outcomes.

### **Themes Prevalent in US Country Report**

The California Bridges project addressed several themes prevalent in the Organization for Economic Cooperation and Development's (OECD's) Country Report prepared by the United States involving the need to remove barriers and improve school-to-work outcomes for youth with disabilities. To accomplish this, the Bridges project included: (1) person-centered goals to direct transition; (2) partnerships to coordinate and to provide intensive transition services; and (3) hands-on employment training.

Federal and state agencies, school districts, teachers, and service providers are responsible for various aspects of transition services for youth with disabilities in or out-of-school. Even though there are a number of laws<sup>28</sup> to support successful outcomes for these youth in transition, there is generally a lack of follow-up on goals to achieve post-school outcomes. One key step the Bridges project took was establishing person-centered goals directing the youth's transition plan. Bridges' emphasized early and frequent person-centered planning sessions to ensure transition plans were carried out.

The US country report also acknowledged that better coordination is needed to fully integrate the various transition systems. The lack of systems coordination (among service sectors and between secondary and tertiary education) for delivering transition services provides many opportunities for youth to be "lost in the system." Bridges staff recognized the importance of coordination among partners to achieve successful transition outcomes. Their effort to build collaboration took place at all levels — federal, state, and local.

Finally, as the U.S. country report acknowledged, career-technical education services have diminished recently in response to increased attention to performance in basic subjects. Bridges staff recognized the important role of early work experience as a first step into specific careers. One important job training resource was the Regional Occupational Programs, public education programs providing hands-on career preparation and skill training for particular jobs. By providing work experience for youth with disabilities while in secondary school and supporting youth to remain in competitive employment after exiting school, Bridges staff helped youth explore and realize their career opportunities.

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<sup>28</sup> For example, the Individuals with Disabilities Education Act (IDEA), the Rehabilitation Act (Section 504), the Americans with Disability Act, and the Workforce Investment Act all provide legal foundations for transition supports.

**Conclusion**

The YTD projects developed and implemented practices to support post-secondary/tertiary education and employment. A part from the waivers, which increased the incentives for employment and savings among SSI recipients, Bridges was able to create a system that provided direct delivery and coordination of services in the school system. While this change in practice is directly attributable to the Bridges YTD project, and while it has the potential to eliminate a significant barrier to work for many young SSI recipients, it does not necessitate a change to SSA policy. By breaking down the silos in which different agencies work, SSA and its community partners in the Bridges project (and other YTD sites), have been able to achieve substantial changes on the transition process and dramatically affect beneficiaries' lives.

Table 1: Demographic Characteristics of Bridges Participants

	Percent
<b>Gender</b>	
Male	55.4%
Female	44.6%
<b>Race/Ethnicity</b>	
White	48.2%
Black	14.7%
Latino	26.0%
Asian	4.8%
Other	6.3%
<b>Bridges Educational Category</b>	
Intellectual Disability	29.0%
Hard of Hearing	0.6%
Deaf	1.2%
Speech/Language Impaired	1.8%
Visually Impaired	1.0%
Seriously Emotionally Disturbed	6.8%
Orthopedically Impaired	7.9%
Other Health Impaired	8.7%
Specific Learning Disabilities	25.4%
Multi-Handicapped	2.8%
Autistic	12.1%
Traumatic Brain Injury	1.4%
Blind	1.2%
Missing	0.2%
<b>Age at Enrollment</b>	
≤14	4.0%
15	6.2%
16	8.3%
17	14.7%
18	19.4%
19	16.1%
20	9.7%
21	9.1%
22	4.6%
23	3.8%
≥24	4.2%

Source: Calculations based on SSA administrative extracts and CA YTD management information database



Table 2: Work and Education Status at Beginning and End of YTD

	First Quarter in	Last Quarter in
	Bridges Database <sup>1</sup>	Bridges Database <sup>1</sup>
	Percent	Percent
<b>Current Status<sup>2</sup></b>		
School/No Work	55.1%	26.2%
No School/No Work	11.3%	15.5%
Work-Regular Job	4.8%	23.2%
Working/School	12.2%	12.5%
Working-Sheltered/School	9.2%	3.9%
Volunteer	0.9%	0.9%
Apprentice or Paid Training	0.0%	0.6%
Job Coach/Supported Employment	2.4%	5.4%
Military	0.3%	0.0%
Work-Center for PWD	0.0%	1.5%
School/Job Training	3.9%	7.1%
Other	0.0%	1.5%
Unknown	0.0%	1.8%
<b>School Status<sup>3</sup></b>		
In School	80.4%	49.7%
Out of School	19.6%	50.3%
<b>Education</b>		
Any Community College	12.5%	30.6%
Any College	0.6%	1.4%
Completed Community College	0.2%	0.6%
Completed College	0.0%	0.4%

Source: Calculations based on SSA administrative extracts and CA YTD management information database

<sup>1</sup> The first quarter in the Bridges data base refers to the first quarter during or after the youth consented to be in the Bridges project. SSA benefit statistics are based on the month of consent (for the first quarter) and last month in the final quarter for which individual has data (for the last quarter).

<sup>2</sup> Current Status is limited to youth with a known status in the first quarter.

<sup>3</sup> Youth are considered in school if they are in any of the following categories Current Status categories: School/No Work; Working/School; Working-Sheltered/School; and School/Job Training categories. The remaining youth are considered out of school.

Table 3: Services Received from Bridges

	Percent
Any Service Received Ever	80.6%
Which Service (If Received Service)	
Job Training	78.3%
Job Placement	58.5%
Pre-vocational Training	69.8%
Testing/Evaluation	46.3%
Financial Assistance	31.0%
Counseling/Therapy	23.9%
Legal/Advocacy Services	2.0%
Health Services	26.1%
Support on the Job, Extra Training	47.1%
Mental Health Services	16.3%
Living Skills	69.0%

Source: Calculations based on SSA administrative extracts and CA YTD management information

Table 4: Work and Education Status at Beginning and End of YTD

	First Quarter in	Last Quarter in
	Bridges Database <sup>1</sup>	Bridges Database <sup>1</sup>
	Percent	Percent
SSA Benefits in SSA Admin Records		
SSI	48.0%	62.5%
SSDI	9.1%	18.7%
SSDI Worker	6.5%	16.9%
SSDI Child	2.6%	1.8%
SSI or SSDI	53.2%	69.0%
SSI and SSDI	4.0%	12.1%

Source: Calculations based on SSA administrative extracts and CA YTD management information database

<sup>1</sup> The first quarter in the Bridges data base refers to the first quarter during or after the youth consented to be in the Bridges project. SSA benefit statistics are based on the month of consent (for the first quarter) and last month in the final quarter for which individual has data (for the last quarter).

Table 5: Earnings by Year Since Enrollment

Years Since Enrollment	N	Percent with Positive Earnings	Mean Earnings <sup>1</sup>	Percent with Earnings ?\$1020	Mean Earnings <sup>1</sup> if ?\$1020
-2	504	32.54%	\$544.49	13.89%	\$3,528.51
-1	504	43.45%	\$803.93	19.64%	\$3,729.88
0	504	59.52%	\$1,269.73	29.76%	\$3,878.70
1	504	69.44%	\$2,220.86	37.90%	\$5,531.41
2	437	67.96%	\$3,293.41	44.62%	\$7,178.92
3	373	63.81%	\$3,949.25	48.26%	\$8,035.94
4	255	60.78%	\$4,340.42	47.06%	\$9,102.38

Note: The \$1020 threshold represents sum of the monthly earnings an individual can earn in a year, applying both the general (\$20) and earned (\$65) income exclusions, that can be disregarded under SSI program rules.

Source: Calculations based on SSA administrative extracts and CA YTD management information database.

<sup>1</sup>Mean earnings are in 2008 dollars.

Table 6: SSA Work Incentive and Waiver Use

	Percent
Positive Earnings (reported to SSA)	56.6%
Any Work Incentive or Waiver Use	55.0%
SEIE Standard	26.0%
SEIE Waiver	16.0%
IDA	0.3%
3/4 Waiver	39.4%
PASS Standard	1.4%
PASS Waiver	0.3%
CDR/Age 18 (Section 301)	2.2%

Source: Calculations based on SSA administrative extracts reported in "Use of SSA Work Incentives and Waivers in the Original YTD Projects" memo 11/9/2009.

Appendix Table 1: SSA Work Incentives and YTD Waivers

Title of Policy	Current Policy	Policy Change (waiver)
<i>Supplemental Security Income</i> Student Earned Income Exclusion (SEIE)	The SEIE allows Social Security to exclude a large part of a working student's monthly earnings. In 2009 and 2010, Social Security excludes the first \$1,640 that a student earns each month, up to a maximum of \$6,600 for the year. Normally, the SEIE stops at age 22.	The SEIE has no age limit for YTD participants. The SEIE continues regardless of age as long as they are regularly attending school.
General Earned Income Exclusion (GEIE)	For most Supplemental Security Income (SSI) recipients, the GEIE allows Social Security to exclude the first \$65 of earnings from a job plus half of additional earnings.	The GEIE is more generous for YTD participants. Social Security will exclude the first \$65 plus \$3 of every \$4 over \$65.
Plan to Achieve Self-Support (PASS)	A PASS helps disability beneficiaries obtain a specific job or start a business. Social Security excludes income and resources that an individual uses to pay for approved PASS expenses, which may include the cost of owning a car, pursuing an education, purchasing assistive technology, and other things needed to achieve an approved PASS goal. These exclusions may allow an individual to maintain eligibility for SSI and health insurance and to receive a larger benefit.	The PASS program is more flexible for YTD participants, who can also use a PASS to explore career options or pursue additional education.
Individual Development Accounts (IDA)	An IDA is a trust-like savings account that helps an individual save for a specific goal, such as purchasing a home, going to school, or starting a business. Earnings that a participant deposits in one of these accounts are matched by the IDA program. Most matches are on the order of \$2 for every \$1 deposited by the participant. The money that has accumulated in an IDA is not counted when determining eligibility for SSI, and the earnings deposited in an IDA during a month are not counted when determining the SSI benefit amount.	A YTD participant may also use an IDA to save for other approved goals.
<i>Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) Continuing Disability Reviews and Age 18 Redeterminations</i>	Benefits based on disability may continue despite a negative determination from a CDR or age 18 medical redetermination if: <ul style="list-style-type: none"> <li>• the beneficiary is participating in any of certain programs; and</li> <li>• SSA determines that continued participation will increase the likelihood that the individual will remain off the disability rolls permanently once benefits stop.</li> </ul> <p>These "likelihood" determinations normally must be made on a case-by-case basis.</p>	YTD participants receive additional protections when facing CDRs and Age 18 Redeterminations. If Social Security determines that medical disability has stopped and the participant is no longer eligible for assistance, the participant will continue to receive BOTH cash benefits and health care while participating in YTD. As a result, the participant can complete work towards financial independence without the loss of benefits even though Social Security has determined that the participant is no longer medically eligible to receive benefits.

Note: See [www.socialsecurity.gov/redbook](http://www.socialsecurity.gov/redbook) for other SSA work incentives.