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# Show Me the Money: Flexible Funding for Job Success

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Suggested audiences:

- [People with disabilities & family members](#),
- [Direct support professionals](#) &
- [Researchers](#)
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This website is intended to help people use **flexible funding** to find and keep the jobs they want. The **funding** might come from the Vocational Rehabilitation or Developmental Disabilities agency in your state, your school district, or maybe through the Social Security Administration. The **flexible** part means that **you decide** how to use the funding to get the job you really want. You might pick a service provider agency, take classes, buy equipment for your business, or interview and hire a job coach who works directly for you.

Right now, there is no special website for flexible funding. Flexible funding is one part of "self-determination." Self-determination" is a bigger idea that means that people choose the services they want and the providers they want, and control other decisions because they are the authorities over themselves. [To find out more about self-determination, check out these websites.](#)

In the future you'll be able to read information from parents, advocates, personal agents, service coordinators, and others about helping someone take control of their funding. We hope that these stories will encourage people to ask about flexible funding so that they can take control of their jobs and careers.

Learn about people across the country who have used flexible funding. Click on the person's name to read their story. You can also read their [tips for job seekers](#).

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| Who?                     | Where?     | What Job or Career?                     |
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| <a href="#">Jeanette</a> | Washington | Kennel worker and dog walker            |
| <a href="#">Mary</a>     | Vermont    | Fine arts store assistant               |
| <a href="#">Brian</a>    | Washington | Maintenance and yardwork business owner |
| <a href="#">Andy</a>     | Oregon     | Data entry                              |

|                         |               |  |
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| <a href="#">Nancy</a>   | Ohio          | Mail deliverer, office worker                        |
| <a href="#">Judy</a>    | Michigan      | T-shirt designer and seller                          |
| <a href="#">Michael</a> | Washington    | High school student, exploring different jobs        |
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| <a href="#">Scott</a>   | Florida       | Product stocker, looking for an office assistant job |

## JEANETTE, Washington KENNEL WORKER AND DOG WALKER

### Who helped her get control over her funding?

- Carrie, a caseworker from the WISE program (Washington Initiative for Supported Employment)

### Where does the money come from?

- The Department of Developmental Disabilities and the Department of Vocational Rehabilitation

### What does she use the money for?

- To pay a support person to help her learn to do her job at a dog kennel

Jeanette turned her love of animals into a great job in May 2002. She works at a dog kennel where she gets paid to play with the dogs and walk them. She also does other things that keep the dogs happy while they are away from home. She actually got this job as part of her college course. She was trying out an office job doing data processing at an animal shelter, and after a while switched to dog-walking. She was trying out the office job because at first that was the type of job she thought she wanted. But then she realized that taking care of the dogs was really the job she wanted.

Jeanette got a flyer in the mail inviting her to a meeting to find out about flexible funding and supported employment. She had gotten the same flyer the year before, but was in an office certificate program at the community college and not ready to look for work. This year, when the flyer came, Jeanette had decided that she didn't want to work in an office. Her mother, Peggy, remembers that the flyer said that flexible funding for supported employment was meant to help her find and keep a job that "she really wanted to do." Although Jeanette usually doesn't like to go to meetings, when she realized that this might be a good way to her dream job of working with dogs, she went to the meeting with her mother. They filled out an application right at the meeting.

Soon afterwards, Carrie met with Jeanette and Peggy at home to talk more about what Jeanette wanted to do. They started planning months before Jeanette graduated from the community college program. In about three weeks, they found out that Jeanette would get flexible funding.

Next, Jeanette needed to find someone who would help her get a job working with animals instead of an office job. Jeanette and Peggy checked out some places that helped people find jobs and job coach them, but in the end they stayed with a place called Service Alternatives that was already helping Jeanette with her volunteer work. She stayed with them because she and Peggy felt that they really listened to what Jeanette wanted. Service Alternatives thought that Ben would be a good job coach for Jeanette and she thought so too. As it turned out, she only applied for one job and got it right away. Ben heard about the job from Jeanette's Vocational Rehabilitation counselor, Doug, whose wife used to be the manager at the dog kennel and still worked there part-time.

Jeanette is using her flexible funding to pay Ben, so she signs his timesheets and Service Alternatives pays him from her account there. Vocational Rehabilitation paid for Ben to help Jeanette find a job. Once she got the job, Jeanette used her flexible funding to pay Ben to be her job coach. At first, Ben accompanied her to the orientation session and training. Now, he visits Jeanette at the dog kennel a few times a month, just to check in with her. Jeanette feels totally comfortable with this job and is doing very well. Soon she might not need Ben at all anymore.

The dogs at the kennel need to be played with and walked every day of the week, so Jeanette usually works four or five days a week, about three to eight hours a day. It all depends on how many dogs are there. Summer and holidays are a busy time because so many people leave their dogs at the kennel while they go on vacation. Jeanette knows how to handle the dogs and sometimes she plays with four at a time, or walks two at a time. For Jeanette, this is easy and fun work, and this job is the best of all possible jobs.

Jeanette's mother's advice to others using flexible funding is to choose the right service provider to help find the right job. A service provider who doesn't pay as much attention to important details may end up suggesting that a person try jobs that they won't like and that don't match their career goals. Jeanette and Peggy experienced that before they switched to Service Alternatives. Peggy is also pleased that Ben and other people at Service Alternatives keep in good contact with her, since she is so involved with her daughter. Peggy says that the WISE program has given her a feeling of empowerment, and that Jeanette definitely has more control. "I didn't realize how many rights Jeanette has. WISE made me realize that Jeanette has a lot of rights to decide her own future."



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## **MARY, Vermont**

### **FINE ARTS STORE ASSISTANT**

**Who helped her get control over her funding?**

- Sally, a caseworker who was helping recent high school graduates access special grant funding to look for the right job

### **Where does the money come from?**

- A special grant offered through Medicaid and the Department of Vocational Rehabilitation in Vermont

### **What does she use the money for?**

- To pay Sally, who supports her at her job

Mary works 15 hours a week at a business that stores and sells fine arts prints. In the three hours she works each day, she does a variety of tasks to support the work the graphic artists are doing around her. In order to get her work done, she has to move all around the company and know where different materials are. Her job involves working around other people, and she knows that she's helping them. Since she enjoys doing a variety of tasks and being around people, this is a good job for her.

Seven years ago, Mary was about ready to graduate from high school. At the same time, a six-month school-to-work grant had some money available to help her and her classmates. Students who had not had much job training could use the funding to get better training and find work after graduation. Mary had new options because of this grant. Her mother, who had always believed that her daughter could and should have a job, and should contribute to the household income as long as she lived at home, made sure that the school and supported employment staff considered Mary and what she was able to do.

Sally, a supported employment worker, got to know Mary and watched her do the volunteer jobs she had after school. Mary's volunteer work included taking care of plants in a greenhouse and delivering flowers to patients at the local hospital.

Since Sally now knew what Mary did well and enjoyed, she began looking for places in the community where Mary could work. From traveling around the community, Sally knew that there was a graphics business starting. She went there, found out what they would be doing, and asked the owners whether Mary could work for them, doing tasks that would help the graphic artists get their own work done. They agreed, and Mary began working there one hour a week. As she and Sally learned the schedule for the week and the tasks she would do, Mary worked more and more hours, patiently learning everything. The money from the school-to-work grant was used during this time to pay for any support Mary would need, including her time with Sally, as she got used to the job.

Once the money from the school-to-work grant had been spent, Sally worked with the state Department of Developmental and Mental Health Services (DDMHS) to direct a portion of the funding Mary received through them toward more employment support. Mary and her family thought it would be good if Sally could continue to work with Mary, so Sally became an independent support person, paid by the state from this funding source. Mary and her mother keep track of Sally's hours and send her time sheets to DDMHS, which pays Sally. The fine arts prints company pays Mary directly.

In Mary's case, there weren't any big problems in using the funds for the support she needed. The supported employment funding is only available for 15 hours a week, but that's a perfect amount of time for Mary. Mary likes the job, and people at work know they can depend on her to help them.

## **BRIAN, Washington**

### **MAINTENANCE AND YARDWORK BUSINESS OWNER**

#### **Who helped him get control over his funding?**

- Carrie, a personal agent from the Washington Initiative New Pathways Program

#### **Where does the money come from?**

- The Department of Developmental Disabilities and North Snohomish County

#### **What does he use the money for?**

- To buy a lawn mower
- To pay for a business license and business cards
- To pay for a personal job agent to help him with his self-esteem, reading, interviewing and other professional skills

When Brian started to look for a part-time job, he knew that he wanted to do maintenance and yard work. He was self-employed part-time in those areas, but it wasn't steady work. He decided that a part-time job working for someone else would be a good idea to make more money. He did consider starting his own business, and submitted a business plan to the Vocational Rehabilitation agency, but they did not "jump at the opportunity to fund small business ventures," says Brian.

Getting flexible funding was an easy process for Brian. One evening he went to an informational conference, and while he was there he filled out an application for funding from the Department of Developmental Disabilities. He has mainly used his flexible funding to help in his job search. It wasn't easy to find the kind of work he wanted, but he and his job coach, Sam, made phone calls and answered ads in the paper.

By using flexible funding, Brian had control over who worked with him. He said that having this control made a temporary problem easier to solve. His first job coach didn't work hard to help Brian with the job search. Once he told Carrie, the caseworker who had helped him find out about flexible funding, that the first job coach wasn't being helpful, Carrie recommended Sam, who turned out to be a much better job coach. Sam, with the help of Brian's new personal agent, Heather, keeps a record of what is done every week, and Brian reviews it and signs the form so that Sam can be paid.

Because Sam and Brian didn't find a part-time job for Brian working for someone else, Brian decided to start his own business landscaping and cleaning parking lots. Brian knocked on people's doors to find out who some of the parking lot owners were. Sam also helped to find out who owned some parking lots.

Last summer, Brian used some of his flexible funding to buy a lawnmower. Now he's using the flexible funding to apply for a business license.

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## **ANDY, Oregon**

### **DATA ENTRY**

#### **Who helped him get control over his funding?**

- Andy's mother

## **Where does the money come from?**

- Andy's school district
- Vocational Rehabilitation
- Medical insurance
- Medicaid
- The Workforce Investment Act
- A Social Security PASS Plan

## **What does he use the money for?**

- To pay for a special computer, a conveyor belt, and personal support people

How did hiring Andy to do data entry at Powell's Books make things better for some of his coworkers? Because Andy needed a conveyor belt as a workplace accommodation, other workers also got one and they're happy to have conveyor belts like his to move the books along.

Andy is a member of the pricing task force at Powell's, working 20 hours a week. Besides a conveyor belt, he uses a head switch to operate equipment at work. The computer he can operate this way is connected to the Powell's computer, so this is how Andy gets information about each book into that computer. All the books at the used bookstore's nine locations must be listed and priced in the store's inventory.

Once he graduated from high school, Andy wasn't planning a specific career or thinking about a particular job. He was sure that just finding any job would be a big challenge. Still, he wanted a job very much. "Part of the problem, when you have the type of disability that I do," says Andy, "is that you have to find a job that you can do with some adaptations and a business that will hire you." One thing Andy's parents realized, as they thought of jobs Andy could do, was that Andy, moving his head, could use a switch to control some type of machine. This led to the idea that Andy could use his head and a switch to operate equipment at a job.

Andy's mother, who is his guardian, learned how to apply for and combine several different funding sources to pay for accommodations and help Andy get a job. Andy applied to Careers, Community and Family to receive a grant to help him find the right job. First, though, Andy's family decided to ask the school district to pay for help from a job developer. When this job developer didn't work out, Andy and his family thought Careers, Community and Family would be more helpful.

This time, things worked out much better. Andy received \$3,000 from the Careers, Community and Family project. JoAnn, the project's director, helped Andy and his parents think about jobs Andy could do. Five months later, JoAnn connected Andy with Powell's Books, which matched both Andy's interests and his previous work experience in his high school's library. Andy's parents figured out how to adapt the job so that Andy could use a head switch to run devices connected to the computer he would need to use for pricing.

Andy also needed a support person to help him at work and with personal tasks. Andy says his mother wrote a job description, and interviewed and hired people to work for Andy. Andy's sister also learned how to be a support person if a backup support person was ever needed.

There have been some frustrations throughout all of this. Some things have taken more time than Andy and his mother would have liked. Before they can be hired, support people need to have a background check, which takes a long time. Although Andy and his mother control how the money is used, none of it comes directly to them, so his mother signs the support staffers' time sheets and sends them to the state. The state's fiscal intermediary then mails the support person a check.

Andy is glad that he and his mother are able to choose the people he would work with and control so much of the process as they worked hard to set up and keep his job. He really likes the job and the friends he's made in the two years that he's been working at Powell's. He is treated the same as anyone else who works there, with the same expectations. He has had yearly performance reviews and four pay raises since he started. He now makes \$9.81 an hour. He doesn't want to work anywhere else.

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## **NANCY, Ohio**

### **MAIL DELIVERER, OFFICE WORKER**

#### **Who helped her get control over her funding?**

- Nancy's parents and a benefits specialist from the local Mental Retardation/Developmental Disabilities (MR/DD) agency

#### **Where does the money come from?**

- Vocational Rehabilitation and the MR/DD county board

#### **What does she use the money for?**

- To pay for a full-time job coach

Nancy delivers mail for the Summit County Department of Office Services throughout downtown Akron, Ohio. For a person who really likes to be around people and keep moving on the job, this is perfect. She also puts county records on microfilm. Nancy's smile and relaxed manner let her parents, job coach/behavior support specialist, and co-workers know that she is happy with her job. Judging from the comments and compliments she gets from her co-workers, they are happy with her as well.

While she was in high school, she participated in a work experience program at Kent State University, picking up books in the library and delivering mail in the education building. Here she discovered her interest in and enjoyment of these types of duties.

She now works full-time at union scale and has since 1995. Like other county government employees, she gets regular benefits such as vacations, health coverage, and raises. BJ, her job coach/behavior support specialist, works with her full-time, mostly to help her behave appropriately at work. She drives Nancy to various offices so Nancy can deliver and pick up mail, and helps her learn new job duties.

Because Nancy needs a lot of support, she and her family knew she would have to get and keep a job that would help pay a substantial part of the support she needed. Nancy's parents created an interagency cooperative agreement and transition plan while she was in high school and made sure that Vocational Rehabilitation was one of the agencies involved to help Nancy find full-time employment. Nancy's flexible funding planning began at this point with the creation of a Social Security Work Incentive called a PASS plan.

The best part of Nancy's flexible funding was that she and her parents could choose the agency and staff people who would serve her in residential and employment settings. At Nancy's job with the county, they realized that Nancy worked best when she had the same job coach/behavior support specialist with her day after day. Because Nancy and her parents were pleased with the agency providing her residential support, they asked the same agency to provide employment support as

well when the time came for that. Nancy's family is very aware of when Nancy is satisfied with services or not by how she reacts to people and situations. Even though she doesn't talk, it shows.

Nancy's mother is her guardian, and her father is a "limited service provider" who contracts for Nancy's services with the MR/DD county board and the agency that is her adult service provider. This allows full control and choice over how her funds are used. What is important is that Nancy has all the 24/7 support she needs, not just employment support.

More recently, Nancy's parents have moved her from a PASS plan to a different kind of Social Security Work Incentive called an IRWE (Impairment Related Work Expense). This is a way for Nancy to keep her Supplemental Security Income benefits and Medicaid coverage even though she is earning a good income.

Since Nancy and her family make the decisions and choose the provider and staff people, Nancy is able to work at a job she enjoys and that everyone agrees she does well, plus she can live in her own home and have fun in the community.

In the spring of 2003, Nancy won the American Society of Autism 2003 Outstanding Individual with Autism award, which she received at their annual conference in July. The award is given to a person with autism who has accomplished a great deal.

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## **JUDY, Michigan**

### **T-SHIRT DESIGNER AND SELLER**

#### **Who helped her get control over her funding?**

- Joe, her coordinator of employment development

#### **Where does the money come from?**

- Medicaid waiver funds and Michigan Rehabilitation Service funds for self-employment

#### **What does she use the money for?**

- To buy supplies and equipment for her business, Judy T's
- To buy insurance for her business
- To pay Emily, a business support person, who keeps track of T-shirt sales, business expenses, and everyone's work hours so that they are paid the right amount
- To pay Miranda, a marketing assistant, who helps design and sell the T-shirts

Judy is very outgoing, which is a good quality for her job of selling T-shirts decorated with her own designs. Before starting a business selling T-shirts, Judy worked at a workshop in Allegan, Michigan. Then she started working part-time at B&C Trophies, doing janitorial work and sorting letters for the trophies. She still works there, but this story is mainly about how she used flexible funding for her own T-shirt business, Judy T's.

Joe, Judy's coordinator of employment development, knew that she enjoyed letters and words and liked to write stories and poetry. One October day in 2000, he introduced Judy to Dan, a man who owned a company where he sold things he created such as T-shirts and poetry. Judy was interested in his products and how he made and sold them, and Dan and Judy decided that Judy should become a salesperson for his T-shirts. She's done very well as a distributor, selling many of the shirts from Dan's company, mostly at sales booths at conferences.

After a while, Judy decided that she wanted to design and sell decorated T-shirts herself. She told Joe about this and he helped her to find the money to support her new business. He knew Judy could use her Medicaid waiver funds as flexible funding. Joe was able to redirect this money fairly easily by reviewing Judy's ISP (individual support plan) with her. He helped her update the plan to say that she would be using the money to start her own business. Judy says there were no problems in changing the use of this money.

There was also other money that Judy also used to help develop her T-shirt business. The Michigan Rehabilitation Services (Vocational Rehabilitation) gave Judy and some other people who were starting their own businesses some money to support their businesses. Joe and Judy decided to use this money to buy a portable embroidery machine. Judy's business will have to pay to keep the machine working and for electricity to run it.

Judy began to need other people to help with her T-shirt business. With Joe's help, she put an ad in the local newspaper for someone to help her run Judy T's. She ended up hiring Emily. Emily keeps records of the T-shirt sales, the hours Judy and Emily work together, and all the business expenses. Emily also keeps records of Judy's work with the job coach at her part-time job at the trophy store. Judy needs to keep track of that information so that she will continue to get the right amount of flexible funding.

Emily and Joe helped Judy write a three-year business plan, which helps her to know what to do next to keep her business going and growing. Her first plan made her realize that she would have to buy more supplies and liability insurance to protect the business, and do some specific things to test-market her shirts.

Judy wants to sell her shirts to bigger markets such as churches, schools, and other businesses and conferences. She ran an ad for an assistant with marketing experience who could help her find more places to sell her T-shirts. Judy interviewed three people and decided that Miranda would work best with her.

Judy's business is off to a good start. So far, Judy T's has sold T-shirts at 11 conferences for people with developmental disabilities. In 2002, Judy T's sold more than \$4000 worth of shirts. Judy and her business team-- Joe, Miranda, and Emily-- are working with Michigan Rehabilitation Services so that Judy can buy better signs to advertise her shirts, and join the local Chamber of Commerce. Judy is also working on a Plan for Achieving Self-Support (PASS) to use some of her Social Security Disability Income for more business supplies. As Joe and Emily help her expand the business, they keep checking with Judy to see what she's thinking, and whether she's still enjoying this work.

Judy says she enjoys selling T-shirts and wants to be able to sell more. She enjoys traveling to the conferences, meeting new people, and making money through her T-shirt sales. She likes working for herself-- and with only a few other people-- because it is quieter and less stressful than the workshop. Since she owns Judy T's, she makes decisions about the business, such as who to hire as assistants. There are a lot of things a person has to do to start and run her own business, but Judy says it is worth the effort.

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## **MICHAEL, Washington**

### **HIGH SCHOOL JUNIOR, JOB EXPLORATION**

#### **Who helped him get control over his funding?**

- Melody, from the Washington Initiative for Supported Employment program (WISE)

**Where does the money come from?**

- WISE, part of the Washington Department of Developmental Disabilities

**What does he use the money for?**

- To pay for a job coach

Michael is a junior in high school student who takes classes in the morning and works in the afternoons. Since the summer, he's been working in a camp cafeteria. The camp is close enough to his house for him to ride his bike to work. Since he is just starting to think about what sort of job and career he would like, he's going to try out other jobs too so that he can learn what he really wants to do. Michael is trying many different jobs so that by the time he finishes school at age 21, he'll know what kind of work he really wants, and employers will see that he has work experience.

Michael was one of five students at his high school who were asked if they were interested in a new program that helps students try out different jobs. Melody and other people from the WISE program worked with the students. Melody explained the program and made it easy for Michael and his family to apply.

One of the first steps was to help Michael figure out what he was good at and what things he would like in a job. He and his family invited some friends to meet with them and Melody to help figure this out. Everyone, including Michael, thought he should get a job where he'd be with other people because Michael is a "people person." Also, Michael wanted a job that had routine tasks instead of new tasks every day. The group agreed that Michael would need a job coach to get him started at new jobs.

Richard, Michael's dad, found Michael his first job. Richard is a fireman, and he sometimes also works at a camp near their house. He talked to the camp manager about a part-time summer job for Michael. The camp manager thought that Michael could work as a cafeteria helper. He would set the tables, clear the tables, put dishes in the dishwasher, and so on.

Michael and his family decided to use Michael's flexible funding from WISE to hire a job coach. The camp manager thought that Dave, who also worked in the cafeteria, would be a good choice. Michael and Dave agreed. Michael earned minimum wage and saved his money to buy a blue electric guitar. Dave also works part-time at a warehouse, and he's going to try to help Michael get a job there so that Michael can try out working at a warehouse. Michael has also begun to volunteer as an usher and greeter with his dad at their church, which lets him try out another kind of job.

Michael and his family are very happy with the WISE program. All they need to do is sign Dave's timesheet and the WISE program does all the paperwork to pay Dave. They hadn't even thought about Michael starting to work while in high school, but everyone is glad he is--especially Michael.

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## **MARK, Rhode Island SELF-EMPLOYED, TRAVEL TRAINING BUSINESS**

**Who helped him get control over his funding?**

- Mark's parents

**Where does the money come from?**

- The state Developmental Disabilities agency and the Rehabilitation Services Department (VR)

### What does he use the money for?

- To pay Terri, a business and personal support person

Mark's longtime interest in maps, traveling around the city, and cars and buses led him to start his own business as a travel trainer. "This really all stems from Mark and what he can do," say his parents. With his parents' help, Mark started his travel training business in 1998, soon after he graduated from high school. After Mark maps out a route for a client, he and Terri, his business support associate, travel **with** the client along the route for as many times as it takes the client to learn. Then they test the client by having him or her take the trip alone, with Mark and Terri following at a distance. Mark's clients find it especially helpful that he is a professional travel trainer who also has a disability.

The Rehabilitation Services Department (VR) and the Developmental Disabilities Department funded Mark to get services from a supported employment provider, but the support staff unreliable. Mark wanted **one** person who believed in his work to be his business associate. Mark's dad knew about flexible funding through his work at a disability organization, and he realized that it could be useful to Mark.

There wasn't a real program of flexible funding for employment services at the Developmental Disabilities Department, but Mark and his parents figured out what he would need when his VR funding ended. They asked that the two types of funding he was receiving from the Developmental Disabilities Department be combined and applied to Mark's Whole Life Plan (another way of saying "person-centered plan"). This was the first time that someone in this state had asked for the Developmental Disabilities department to blend these two types of funding. Mark's proposal would allow Mark to hire just one person to help him with both business and household and personal tasks. Some of his support person's salary would come directly from earnings from the business. The Developmental Disabilities department approved the plan, and Mark was given the funding to implement it. He hired Terri.

Now she is his director of business operations, helping with the billing and other paperwork. Mark and Terri plan the travel training routes for the clients and then go out and train them. She is a true business partner, working with Mark even at 5:00 in the morning when they need to train someone to reach an early morning job. And as planned, Terri also does things like make lunch. Mark signs Terri's timesheets so that she can be paid by an agency that handles the payroll. This has worked smoothly.

So far, Mark works mostly as a vendor to VR. The contract he and his family developed also allows him to work on a fee-for-service basis for other places, such as a school that had a student who needed to learn to travel independently. Between August 1998 and October 2002, he trained 30 people.

Mark is well known as a transportation authority in his state, and serves on state advisory boards. Accessible Transportation Advisory Committee and Disability Services Improvement Subcommittee. He also gives speeches at local high schools. He is a member of his local Chamber of Commerce. Mark has future plans for his business. Eventually, he would like to sell his travel training services to other state agencies. Recently he has incorporated his business, Accessing Community Transportation (ACT), Inc., as a not-for-profit corporation. He wants the business to grow so that he can earn a steady income even when he doesn't have one-on-one travel training clients. He is interested in training department staff about public transportation for people with disabilities, and possibly serving as a consultant for the Tourism Bureau. The possibilities are limitless!

Mark had a specific dream, and when the typical funding methods didn't make it happen, he and his family figured out what it would take for his travel training business to be successful. They had nothing to lose by presenting their plan for combined and flexible funding, and now Mark is definitely on his way.



## **BARBARA, Montana PERSONAL COMPANION, BUYING A CAR FOR HER BUSINESS**

**Who helped her get control over her funding?**

- Nancy, an advisor to People First and Marsha, a benefits specialist

**Where does the money come from?**

- Barbara's Social Security Plan for Achieving Self Support (PASS)

**What does she intend to do with the money?**

- Buy a car

Barbara's career goal is to be a companion to people with special needs. She enjoys driving people to medical appointments, preparing their meals, and doing a little light housekeeping. She prefers working days, but is willing to work evenings if necessary. She and her job coach are in the middle

of a job search for her. (Barbara had been working at a school, but that wasn't the sort of job she really wanted.)

Barbara got her Montana driver's license in 2000 through a program run by People First. The Montana Developmental Disabilities Council awarded People First a grant to teach people how to drive. Owning a car is very important for Barbara's self-employment as a personal companion, so she needed to figure out how to save the money to buy one. With the help of Nancy, an advisor to the People First group in Montana, and Marsha, a professional who knows a lot about benefits, she worked out a way to use flexible funding. Barbara's flexible funding comes through her Plan for Achieving Self Support plan, which is part of the Social Security program. Barbara receives both SSI and SSDI, and because of that she was able to set up a PASS plan to "shelter" (save) her SSDI money.

Barbara, Nancy, and Marsha worked out a PASS plan that would allow Barbara to save \$11,000 over five years towards a car. Marsha was a big help in talking to the SSI PASS team. The SSI PASS team approved the plan and told Barbara to go ahead and arrange a pre-approved car loan. That's what Barbara is doing now. The SSI PASS team also thought that Barbara should "shelter" money for car insurance and license plates. Barbara hasn't bought a car yet, but she is getting started in the process.

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## **ERIC, New Jersey LIBRARY ASSISTANT**

### **Who helped him get control over his funding?**

- Sue, who knew about a Self-Determination project in New Jersey, and Eric's mom, Doris

### **Where does the money come from?**

- Eric's earnings and the New Jersey Division of Developmental Disabilities Department

### **What does he use the money for?**

- To partially pay for job coaches

Eric has worked for the same medical company for over ten years. Eric started out in accounts payable, but since 1999 he's been working three days a week in the library, putting books away and photocopying articles from medical books for people in other departments. He gets to and from his job on the company van that picks up employees who, like Eric, do not live near public transportation.

Two people helped Eric get control over his employment support funding, Sue and Doris, Eric's mom. Sue, a staff person at a provider agency, told Doris about a program called "Self-Determination" that was being tried out in his state, and she helped Doris and Eric apply for it. It was suggested that Eric use some of the flexible funding money for a job coach, and he thought that was a good idea. Eric uses job coaches when he changes jobs, when he needs to learn new tasks for his job, and sometimes for help with the regular tasks of his job. The coaches are hired by a provider agency that Eric uses for his supports and services. Both Eric and the New Jersey Division of Developmental Disabilities pay the provider agency directly, and the provider agency then pays the job coaches.

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# **MATT, Maryland**

## **SELF-EMPLOYED: YARD CARE BUSINESS**

### **Who helped him get control over his funding?**

- Dennis, Matt's Vocational Rehabilitation counselor

### **Where does the money come from?**

- The Department of Rehabilitation Services (VR)

### **What does he use the money for?**

- Yard care equipment

Matt's yard care business is small but successful. Before deciding to go into business for himself, Matt had a grass-cutting business for ten years with a friend. Matt decided that he wanted to have his own business and, in his words, "wanted to make it legitimate." He also wanted to expand his services from just cutting lawns to taking care of people's yards. In order to do that, he knew he would need more equipment: different lawn mowers, a hedge trimmer, a cart, and a leaf blower.

Dennis, Matt's Vocational Rehabilitation (VR) counselor, told him that there was flexible VR money that Matt could decide how to use. He and Matt spent some time figuring out what Matt would have to do to own his own business. Dennis suggested that a good first step would be for Matt to take a course on how to write a business plan through the local Small Business Development Center office. VR paid for Matt to take this course because it was so important. The course took six months but at the end Matt had a good business plan that described all the steps he would need to take to start his business. The plan also listed the equipment he would need to buy and price estimates from different stores. Matt turned this plan in to Dennis, it was approved by VR, and Matt received a check to buy the equipment he needed.

It took Matt a total of fourteen months to start the yard care business. He says that everyone who helped him was straightforward and that the process of starting the business was fairly smooth. His next step is to buy a truck and a computer so that he can advertise his business online.

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## MARIE, Massachusetts CAREER GOAL: COUNTRY SINGER

Who helped her get control over her funding?

- Community College Connections project staff

**Where does the money come from?**

- First the Community College Connection project, then the Department of Mental Retardation

**What does she use the money for?**

- Voice lessons

Marie was inspired to become a country music singer after watching many country singers perform on TV. If they could do it, so could she. This goal was written into her person-centered education plan while she was still in high school.

The Community College Connection, a special project of the Massachusetts Department of Mental Retardation and the Institute for Community Inclusion, was offered at her high school. Funding from the project could be used to start Marie on her way to becoming a country singer. Marie began to think about what she would need to become a singer and what her expenses would be. She realized that she would need a basic music course, lessons with a music teacher, books, and practice tapes.

Laurie, a project staff person, helped Marie prepare to interview music teachers. Marie interviewed three music teachers and decided that Robin would be the best teacher for her. The Community College Connection project sent Marie a check that would pay for at least 12 voice lessons, and Marie and her family also applied for flexible funding from the Department of Mental Retardation so that she could continue to build her career. The department sends the check to a local family service provider for Marie on Marie's behalf. She and her family have to reapply every three months, at which time Marie is sent a check. She uses this money to continue her weekly music lessons with Robin, who teaches her voice techniques and how to play the piano. She also uses some of the money to pay for transportation to her music lessons.

Marie is learning to be careful about spending her money on her career goals. As she prepares for a career as a country singer, she works twelve hours a week at a college cafeteria dishroom to earn money for the other things that she will need to build her career. Her ultimate goal is to move to Nashville, Tennessee, rent an apartment, and be discovered as a singer. She even has a particular cafe in mind where she can perform--although her mother believes that the record companies in Nashville will be coming to Massachusetts to look for Marie once they hear her!

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## **VINCENT, Missouri**

### **FAST-FOOD WORKER**

**Who helped him get control over his funding?**

- Sue, from the Job Opportunities Program

**Where does the money come from?**

- Missouri Department of Mental Health

**What does he use the money for?**

- To pay a coworker to be his job coach

Vincent has always wanted to work in the food business, and since March of 2001 he's been working at a local Subway, making salads and sandwiches, cleaning, and loading supplies. He's had a lot of experience in food service: he volunteered in the kitchen at the state school and at the workshop he used to be in, and he cooks at home for his mom and stepfather.

Before the job at Subway, Vincent worked at a sheltered workshop. When it closed down, Vincent's mom called Vincent's service coordinator, Patti, from the Missouri Department of Mental Health. Patti encouraged Vincent and his family to think about a job in the community. She connected them with a program called Job Opportunities. Sue, a staff person there, took Vincent to several places to fill out job applications. Vincent knew from the start that he wanted to work in a fast-food restaurant and applied at Subway, although he also applied at other places like Wal-Mart. He was called back for an interview at Subway. The manager was impressed with his enthusiasm, and Vincent began his job the very next day. The Subway manager is glad that he hired Vincent.

The person who was the most helpful in getting Vincent connected to flexible funding that he could control was Sue. Vincent and his mom found out that he could decide how to use his Department of Mental Health funding. Vincent needed a job coach at this job and Heather, another Subway employee, said she would be his job coach. Vincent liked this idea and told the Department of Mental Health that Heather was going to be his job coach. Heather is paid \$2 an hour from Vincent's account to help train him and work with him on tasks at Subway when he needs help.

It's worked out great. Vincent makes more money at Subway because he gets paid minimum wage, unlike his previous job at a sheltered workshop, which paid a lot less. Vincent is also happier because he is working at exactly the type of job he wanted. He likes the people he works with, and they like him. There's nothing better than working at the perfect job for you.

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## **ROB, New Hampshire DATA ENTRY**

### **Who helped him get control over his funding?**

- Rob's parents

### **Where does the money come from?**

- The Medicaid waiver through the New Hampshire Department of Mental Retardation

### **What does he use the money for?**

- To hire a job coach himself instead of getting a job coach from a service provider

One day, Rob's job coach found the perfect job for Rob advertised in the local newspaper: a small bookstore needed a data entry clerk. The store manager had never hired an employee with a disability, so Cindy, Rob's job coach, spent a lot of time talking to the manager about Rob's qualifications and the support she would provide. After a few weeks, the manager agreed to meet Rob, and hired him on the spot. Rob started working there the next day. He is responsible for maintaining the store's inventory on the computer, and for setting up the inventory for the bookstore's website. He works 25 hours a week, five hours a day, with Cindy. She stays with him on the job to help him with problems and make sure he completes tasks successfully. Cindy also drives Rob to and from the bookstore.

Rob and his family found out about flexible funding several months after Rob and Cindy found the job at the bookstore. After a lot of difficulty with the service provider, the family decided to change

to a new vendor. But they wanted Cindy to keep working with Rob, and that's what Cindy wanted too. They both enjoyed working together. Rob's mother called a different agency the family had used for family support for years, and learned from a case manager that the agency had flexible funding available through Department of Mental Retardation for Rob to hire the job coach **he wanted**. He and his family switched to this agency, called Area Agency. It took a while to get all the details arranged, but Rob's parents and staff people at Area Agency set up an arrangement that everyone was happy with.

Now Cindy works directly for Rob and his mom. Area Agency is the "fiscal intermediary." This means that the agency takes care of bookkeeping, reports, monthly timesheets, and other paperwork so that Cindy gets her paycheck and benefits on time. Rob signs Cindy's timecard for her to be paid before it is sent to Area Agency.

With Rob and his mom in control of the money, both Rob and Cindy have the jobs they want. Rob's mom says that Cindy has become more than just a job coach. She thinks of Cindy as Rob's life skills coordinator, and says that they have evolved a wonderful friendship that goes far beyond the job.

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## UPDATE

In March 2002, Rob was let go from his part-time job as a data entry clerk at a bookstore because his boss thought Rob wouldn't be able to use the new computer software.

So for the next six months, Cindy, Rob's support person, looked for jobs for him. It was a hard time to try to find a new job. In the meantime, Cindy and Rob did community things and errands for his parents, and Rob continued to do volunteer work as a teacher's aide in a first-grade classroom every Monday. There he read to the kids and helped them with their words and arts and craft activities. He also helped the teacher do photocopying and set up special celebrations.

It was a long, very challenging, and upsetting summer for Rob.

His mom, Pattie, decided to email everyone she knew who might be able to help find a job for Rob. One of her friends was a selectman in a nearby town, and she called Rob's mom to tell her that she should talk to the Town Manager in her town. All the town hall, they needed someone to learn how to use the digital scanner to scan all the town records. There was no one there who had the time to learn and operate the scanner although this needed to be done.

Pattie called the town manager about 20 minutes later and talked to him about Rob and Cindy. She told him that Cindy would be helping Rob with the interview, and that Cindy's job was to help Rob at work. Pattie made sure that the town manager knew that Cindy worked for Rob and that she was not to be paid by the town.

A few weeks later in August, Rob was hired. He's now working five hours, three days a week. Three town hall departments are fighting over who gets Rob's scanning services next. He's in great demand because he is so good at digital scanning.

Meanwhile, Cindy has become a beloved person in Rob's life and is considered part of his family. When she was away for two weeks, she kept in touch with him by postcards but he greatly missed her. Since he needs her support on the job, he did not work the two weeks she was away. Rob and his parents were very happy when Cindy returned.



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## **SCOTT, Florida PRODUCT STOCKER, LOOKING FOR AN OFFICE ASSISTANT JOB**

### **Who helped him get control over his funding?**

- Jim, from the Florida Department of Children and Families

### **Where does the money come from?**

- The Florida Department of Children and Families

### **What does he use the money for?**

- A job developer and coach to help him find an office job

Scott stocks shelves at a store at an Air Force base in Florida. When he is not working at the base, he is looking for an office clerk position where he can use his computer and communication skills, which he would prefer.

Scott used to receive services from Vocational Rehabilitation. When flexible funding became available through a pilot program, Scott decided to use an agency called Horizons as his service provider. Scott's first job coach from Horizons helped him get the job at the store, and Scott decided to use his funding to pay that job coach to train him. Unfortunately, the job coach became unreliable-- he often didn't show up, and he didn't call Scott to let him know he couldn't be there.

Scott had no problems calling the Horizons office to ask for a different job coach. Linda, the new job coach, was quickly sent to work with him, and she worked out fine. She and Scott have been working hard to find office jobs for Scott to apply for. He has applied at a car dealership, a department store in customer service, and a cable company as an office clerk. Of these three jobs, he wants the office clerk job. Scott also uses some of his funding for physical therapy and strength training at Body Dynamics Gym, which helps him stay in shape and walk better.

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## **Tips for Job Seekers**

The people ICI interviewed had these tips on getting a job and using flexible funding:

### **The Job**

- Decide what your ideal job is and then make sure the people who are helping you know that's what you want to do. You need to be clear first so that you can make sure other people know what you want.
- If you don't know what you want to do, make sure other people know that too. Then they can help you think about what would be a good job for you.
- Keep looking for the right job. Sometimes it takes some time to get the perfect job, so keep trying to get the job or career you really want, but in the meantime take another job.
- Consider using your funding to hire someone to help you find a good job. This is very important since it takes a lot of effort.
- Realize that you can learn a lot from a work opportunity, and educate everyone else about how capable you are.
- Follow your dreams. Don't listen to anyone who says, "You can't do it."

## People

- Find someone to help you get what you want-- a family member, an agency staff person, or other person involved in your life. This person can attend meetings with you and your service providers to help make sure people listen to you.
- Different people have different information about funding. You may get information from your service coordinators, personal agents, Vocational Rehabilitation or other state agency counselors, or parents. Ask the different people you know if they know about "flexible funding" or "individualized funding." Keep looking for people who may know about sources of funding.
- Talk to individuals in your town and county who know a lot about local service agencies and stay in touch with them as resources throughout the process.
- Deal with people from social service agencies calmly. If you're upset with them, they'll avoid talking to you and be less willing to address your concerns.
- Ask the benefit resource specialist at your MR/DD county board or Benefit Planning Outreach Office (BPAO) for help applying for services or dealing with funding or service delivery agencies and their procedures and application forms. This can help you make sure you receive services and keep your benefits.
- Ask the people at your funding agency for permission to talk to other self-advocates who have already gone through the process of making flexible funding work.

## Money

- You may have to ask a lot of questions to find out where you can get flexible funding. Flexible funding may come from the Vocational Rehabilitation agency in your state, the Developmental Disabilities agency, your Social Security PASS plan, or other places and special projects.
- Learn about all the flexible funding available to you and how to make the best use of money from each agency. Right now, this is especially important since funding sources have less money to go around.
- Find out about any grants or other ways to help you choose a job you would like.
- If you are in school, find out early on which social services agency will be responsible for funding the job-related needs you will have as you prepare to leave school.
- Ask the agency for permission to talk to other self-advocates who have gone through the routines of dealing with agencies to get funding.
- Find out what services you need and where all the different kinds of funding are to pay for them.
- Know what you want from the agency, if not how to get it. This depends on what you know works best for yourself.
- Don't be afraid to ask questions and get the information you need.

## Planning How to Use Your Flexible Funding

- Flexible funding is great to use when you're looking for work and deciding what you might want to do.
- Have a plan, because you may be asked for specific details about the services and supports you want.
- Find out exactly what the money can and cannot be used for. Even though you will have control of the funding, there may be rules about how it can be spent.
- Plan for extra costs, because there are job costs that you might not think of right away, like transportation or supplies.
- Don't be discouraged, you can make it happen.

## Self-Employment

- If you can use flexible funding to start your own business, go ahead!
- Make sure there is a need for your business. For instance, Mark knew from experience that the state funded travel training programs for people with disabilities.
- Make connections with people who can refer business to you.
- Find excellent people to work with you who believe in your business.
- You'll need a lot of patience if you want to start your own business, but it is definitely worth it. "Hang in there," says Matt.

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## Methodology

An important component of self-determination, flexible funding is a mechanism intended to ensure that people with developmental disabilities have authority and responsibility for the purchase of their supports and services. The Institute for Community Inclusion (University of Massachusetts Boston) has been funded by the [Administration on Developmental Disabilities](#) at the U.S. Executive Office of Health and Human Services, to research how people with developmental disabilities have gained control of their funding and used it to get the jobs, job training, or careers they want.

ICI researchers recruited working-age people, including young adults, by posting notices on listservs and using other ICI project contacts. Permission was obtained to tape-record the interviews. Study respondents were paid \$50 for the interview. Respondents were screened by the following criteria:

1. Funding came from a state or federal agency;
2. Funding used for employment training or employment;
3. Genuine choice and control of supports and services;
4. Job or career diversity; and
5. Cultural and geographic diversity.

We developed the interview guide through interviews with several people in Massachusetts who had used flexible funding. As we began the semi-structured interviews, some questions were revised slightly. The final questions were:

- How did you find out about this way of funding your services and supports?  
Probe: Who told you about flexible funding?
- What are your employment goals?  
Probe: What sort of work do you want to do?
- What did you decide to do with your funding?  
Probe: What did you tell your (service coordinator, personal agent, etc.) that you wanted to

use the money for?

- What problems have you run into, and how have you solved them?

Probe: Were there any problems in using the money the way you wanted to? What did you do then?

- What advice do you have for other people who want to use flexible (consumer-directed or individualized) funding?

Probe: What do you think that other people should know if they want to control/take charge of their funding?

All questions were faxed, emailed, or mailed to prospective respondents prior to the interviews, which were arranged at the respondent's convenience. With permission of the respondent, questions about the details of flexible funding mechanisms were directed to parents, advocates, or other people who had greater knowledge about the necessary paperwork and other administrative intricacies. Six interviews were conducted in person in Massachusetts, Rhode Island, Washington, and Oregon. Eleven other interviews were conducted over the telephone.

Two project staff reconstructed the interviews by listening to the tapes, which two project staff summarized into the stories. Drafts were sent to the respondents, who made corrections, improvements, and other changes. Pseudonyms were used when requested by the respondent.

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