



**The disability community is diverse.** The LEAD Center is committed to being **intentionally inclusive** of race, ethnicity, gender identity, socioeconomic status, and disability in our research, programs, and partnerships. Talking about “intersectional identities” is important, and we strive to foster a learning environment. Therefore, we invite you to join our events with **empathy and open-mindedness**.

[Learn more about our dedication to Diversity, Equity, Inclusion, and Accessibility \(DEIA\).](#)

# Improving Employment Outcomes: The Critical Role of Financial Education

**April 29, 2024**  
**LEAD Center**

*The LEAD Center is led by [National Disability Institute](#). This grant is fully funded by the United States Department of Labor, Office of Disability Employment Policy in the amount of \$8 million under Grant Number: OD-38977-22-75-4-11. This item does not necessarily reflect the views or policies of the U.S. Department of Labor, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government.*



## Facilitator

### Sarah Loizeaux

Subject Matter Expert on  
Inclusive Career Pathways  
(Facilitator)

LEAD WIOA Policy  
Development Center

National Disability Institute  
(NDI)

# Housekeeping I: Captioning

**Captions** - if you wish to personalize the captioning:

- Click the **“Show Captions”** option in Zoom control to view Captions.
- Alternatively, you may **open a captioning web page** in a new browser tab. **Click the link** posted in the Chat box to [access captions](#).
  - Adjust the background color, text color, and font using the drop-down menus at the top of the browser. Position the window to sit on top of the embedded captioning.

**Webinar Archive** – This webinar is being recorded and the archive and supporting materials will be placed on the LEAD Center website under [Recent & Upcoming Events](#) within 10 business days.

# Housekeeping II: Questions

## Content questions?

Click on the Q&A button and type in your question.

**Tech support questions?** Type your question in the Chat box.



# Welcome and Opening Remarks

**Taryn Williams**

Assistant Secretary

Office of Disability Employment  
Policy,

U.S. Department of Labor



# Learning Objectives



At the end of this webinar, you will learn how:

- Financial education is a critical component of service delivery in the workforce system.
- The Financial Toolkit is a valuable resource to workforce professionals serving jobseekers, including people with disabilities.
- Workforce systems providing financial education services are supporting jobseekers receiving social security disability and other public benefits to achieve economic self-sufficiency.



- [Melissa Robbins](#), CEO, National Association of Workforce Development Professionals (NAWDP)
- [Lance Kaldor](#), Disability Resource Coordinator, Idaho Department of Labor, Boise, Idaho
- [Barbara Green](#), Ticket to Work Coordinator, Workforce Alliance, South Central Connecticut American Job Center

# FINANCIAL SERVICES NEEDS

Financial education is a critical component of service delivery in the workforce system.



NATIONAL ASSOCIATION OF  
**WORKFORCE DEVELOPMENT PROFESSIONALS**  
CONNECT, ADVANCE, INNOVATE



## Financial Education Services Feedback Form (November 2023)

- Understand workforce system's needs in terms of financial education and services.
- Develop responsive approaches to financial capability programming.
- 125 Respondents
  - 33 states and Washington, DC – covering urban, micropolitan, and rural communities.
  - 72 different roles in workforce development.
- 77% of respondents indicated that their organization currently provides customers some form of financial literacy education services.
  - Workshops and events, one-to-one counselling, and sharing relevant resources to customers as needed.

## Confidence Level: Providing Financial Literacy Education

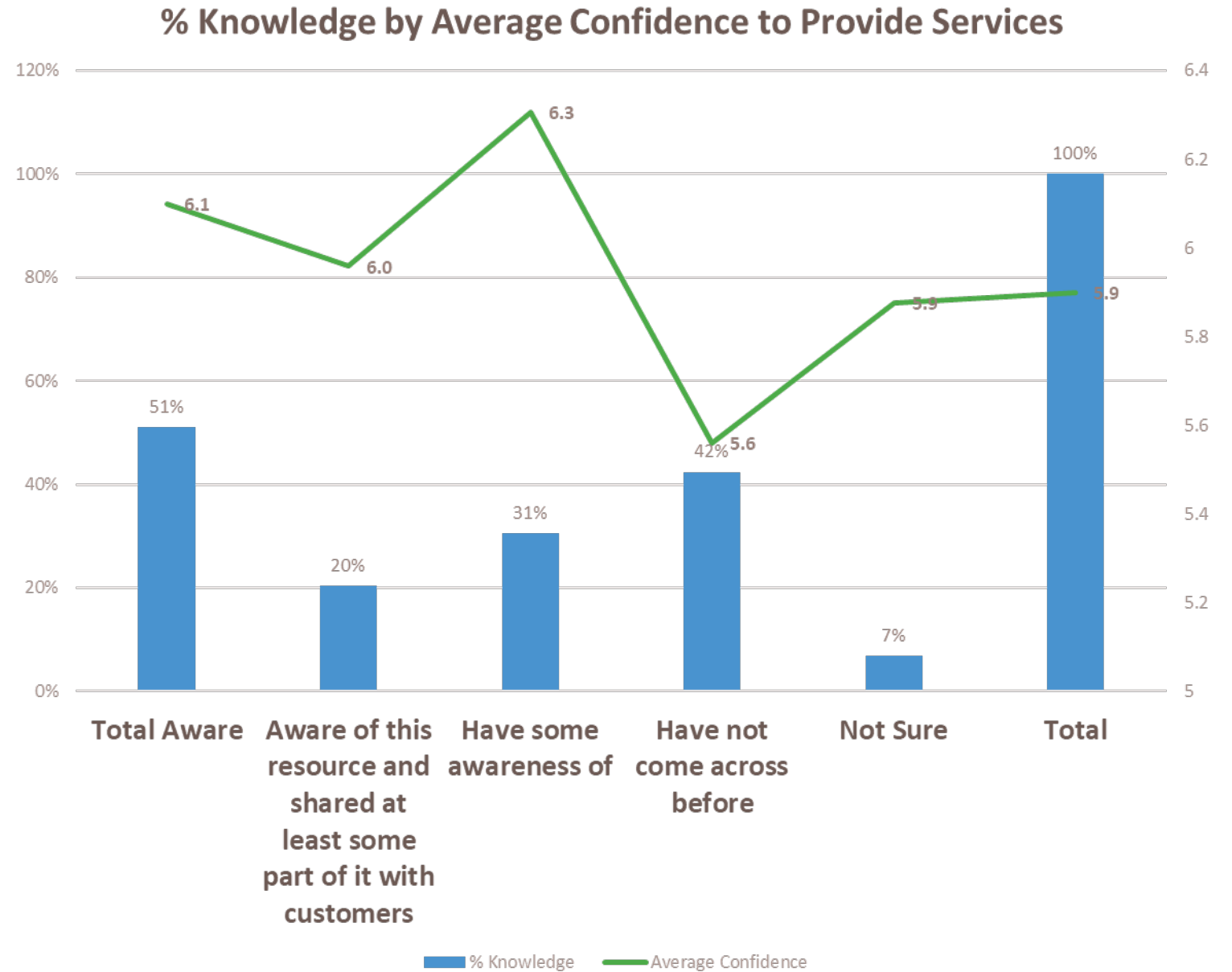
On average workforce professionals felt somewhat comfortable in providing financial literacy education.

**6**

On a scale of 1-10, with 10 being the most confident, and one being least confident, please indicate your level of confidence in providing financial literacy education?  
(AVG)

# Financial Education Support

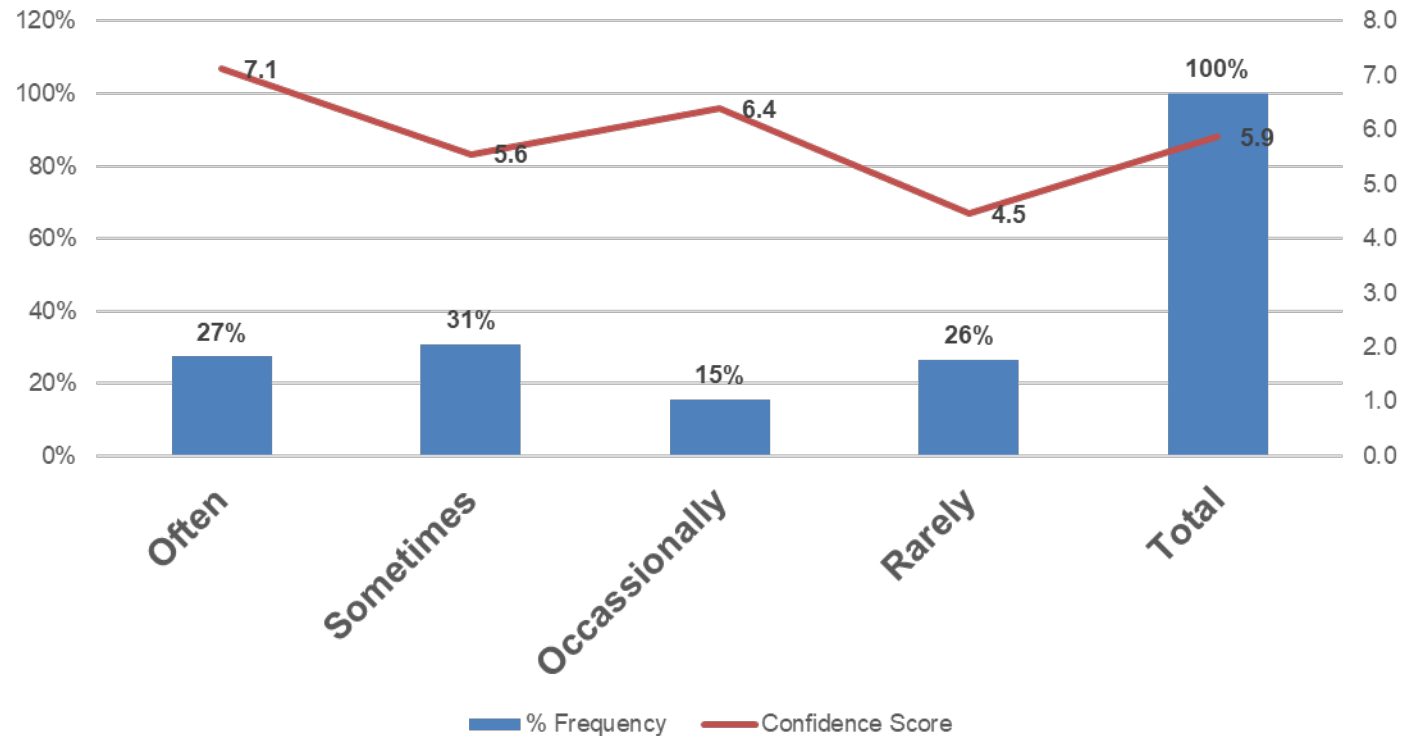
Participants more frequently asked by customers to provide financial literacy education services and support were more confident to provide financial education support.



# Frequency of Services

Participants more frequently asked by customers to provide financial literacy education services and support reported greater confidence with providing financial literacy services and support.

### % Frequency Services Request by Confidence to Provide Services



## What do the preliminary results show...

- Most customers seeking workforce services to meet immediate, basic needs (e.g., income, housing, transportation, etc.).
- Most workforce organizations provide some type of financial literacy services.
- About half of the respondents shared their organization actively partners with a local banking institution or asset building organization.
- Among workforce providers, there is a gap in knowledge of available resources to assist customers in achieving financial wellness (42%).
- Ninety-one percent (91%) of respondents expressed interest in better serving customers achieve financial wellness.

# Financial Toolkit for Individuals with Disabilities



Preparing for a Job

Starting a Job

Maintaining a Job

Changing or Losing a Job

Retiring from a Job

Search the Toolkit

## If you are looking to secure your financial future, you are not alone.

As the job market changes, many people — including people with disabilities — will be making employment-related decisions based on their new financial situation. You may be one of them.

The financial toolkit is an up-to-date repository of financial literacy tools and resources beneficial to all Americans, including individuals from historically underserved populations, striving to achieve financial stability. We all need clear and accurate information to secure our financial well-being.

The toolkit provides a path forward based on where you are in your employment journey. Choose any of the topic areas below — [Preparing for a Job](#), [Starting a Job](#), [Maintaining a Job](#), [Changing or Losing a Job](#), and [Retiring from a Job](#) — for answers to important questions, including tools and resources to help you meet your financial goals.

# Financial Toolkit

Let's take a brief tour!



Preparing  
for a Job



Starting  
a Job



Maintaining  
a Job



Changing or  
Losing a Job



Retiring  
from a Job

## APPLYING THE FINANCIAL TOOLKIT

Using financial education services (for example, the Financial Toolkit) in the workforce system to support customers with disabilities.





## WORKFORCE EMPLOYMENT NETWORK (EN)

Workforce ENs are a financial education resource within the workforce system to support jobseekers receiving benefits.



**CAROLINA ZAMORA-ROCHA**

*Pharmacy Technician*

*Genoa Healthcare*

*Waterbury, CT*



# **WE WANT TO HEAR FROM YOU!**

## ***FINANCIAL SERVICES FEEDBACK FORM***

NAWDP has partnered with National Disability Institute to learn how the workforce system across all titles understands and provides financial capability programming to jobseekers. This QR code will bring you to a brief feedback form. The information collected will be used to develop responsive approaches to financial capability programming that support jobseekers in achieving economic self-sufficiency.



# NAWDP 40<sup>th</sup> Annual Conference

Join NAWDP in commemorating "40 Years of Excellence" at the [Annual Conference on May 20-22, 2024, in San Antonio, TX.](#)

This event brings together thought leaders, professionals and enthusiasts in the field, providing a unique platform to share knowledge, explore emerging trends, and celebrate our collective achievements.

## Check out LEAD Center's Presentation

- Improving Employment Outcomes: The Role of Financial Education
  - May 21 / 9:00 – 10:00 AM ET
  - Join this interactive session to hear about a NAWDP initiative, supported by NDI, to learn about how AJC and other workforce staff support financial literacy.



Questions?

## LEAD CENTER WEBSITE



[LEADCenter.org](http://LEADCenter.org)

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**THANK YOU FOR  
JOINING!**