

Michael W. Morris

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Education

1976 J.D. – *Emory University School of Law (Atlanta, GA)*

1973 B.A., Magna Cum Laude – *Case Western Reserve University (OH)* With Honors in Political Science

Professional Experience

Senior Advisor on Public Policy Research, Syracuse University, Burton Blatt Institute (Washington, DC) 1977—Present

Knowledge translation lead on multiple federally funded projects regarding youth and adults with disabilities: NIDILRR RRTC on Disability Inclusive Employment Policy, NIDILRR Southeast ADA Center, NIDILRR DRRP on Supported Decision Making And Community Participation, NIDILRR DRRP on Community And Work Participation: Participatory Action Research, NIDILRR DRRP on Asset Development And Advancing Economic Self-Sufficiency and California State Planning Grant on Self-Determination And People With Psychiatric Disabilities. Member of research team for the NIDILRR RRTC on Employer Practices.

Senior Strategic Advisor, National Disability Institute (Washington, DC) 2019-Present

Lead development of knowledge dissemination activities with community nonprofits, financial institutions and individuals with disabilities and their families. Supervise the management of the ABLE National Resource Center, with strategic relationships with state ABLE programs and national disability organizations, and the Center for Disability-Inclusive Community Development with relationships with federal agencies and financial institutions regionally and nationally. Conduct research on financial behavior and financial inclusion of people with disabilities. Serve as lead subject matter expert on public policy development and implementation related to Community Reinvestment Act (CRA), Achieving A Better Life Experience (ABLE) Act, Workforce Innovation and Opportunity Act (WIOA) and changes to the tax code to advance financial health and stability for individuals with disabilities and their families.

Executive Director, National Disability Institute (Washington, DC) 2005-2019

Created the ABLE National Resource Center and lead knowledge dissemination activities with over 25 national disability organizations. Established the Center for Disability-Inclusive Community Development and lead knowledge translation activities that brings together the financial and disability communities nationwide to promote greater financial stability and community participation for low and moderate income people with disabilities and their families. Co-chair Public Policy Team for USDOL/ODEP funded LEAD Center to conduct policy analysis on cross-system collaboration, develop new policy products, and draft new legislative proposals to advance employment and economic self-sufficiency for youth and adults with disabilities. Serve as subject matter expert (SME) for ODEPs Employment First State Leadership Mentoring Program (EFSLMP). Provide project leadership and policy expert on blending and/or braiding public resources to the ETA and ODEP funded Training and Technical Assistance activities to over 20 states funded through the Disability Employment Initiative (DEI). Served as Project Lead for USDOL/ETA funded TA to state Work Incentive Grantees to improve services to jobseekers with disabilities in One-Stops and replication of best practices to advance inclusive workforce outcomes. Served as lead researcher to MIG projects nationwide on Medicaid Buy-In, PAS expansion, and policy development to promote interagency collaboration to advance employment, community inclusion and independence for persons with disabilities. Liaison to disability-related organizations and federal agencies to promote interagency collaboration and individual choice and direction of services and public assistance. Lead co-creator of the Real Economic Impact Tour that since 2007 in collaboration with the IRS, FDIC, and Bank of America assisted over two million individuals with disabilities in 100 cities in accessing the Earned Income Tax credit and benefiting from over two billion dollars in refunds. Lead researcher for national long-term service and support grant on financing and systems reform for the

National Council on Disability (NCD). Lead researcher for NCD study on direct and indirect financial incentives for persons with disabilities. Lead expert to CMS and 30 state Real Choice System Change grantees to improve linkages between Medicaid and state and local Public Housing Authorities.

Co-Director of the Law, Health Policy, and Disability Center at the University of Iowa (LHPDC, Washington, DC) 2001-2006

Co-Principal Investigator for NIDRR funded Asset Accumulation and Tax Policy Project in collaboration with World Institute on Disability and Federation of Community Development Credit Unions. Served as Director of the NIDRR funded Research and Training Center on Workforce Investment and Employment Policy for Persons with Disabilities and lead expert on accessibility and the public workforce development system and cost-benefit analysis of effective accommodation practices in an inclusive workforce.

Senior Vice President, Community Options, Inc. (COI, Washington, DC) 1998–2001

Supervised grant development and management of technology projects, Co-Director of the NIDRR-funded Research and Training Center on Workforce Investment and Employment Policy for Persons with Disabilities; Project Director, US Department of Labor funded grant PASS*IT*ON (Plan for Achieving Self-Sufficiency through Information Technology Opportunities Nationwide); Senior Advisor to Project Leadership funded by the Administration on Developmental Disabilities to train parent leaders and self-advocates on the relationship between federal and state policy and support of the principles of self-determination.

Executive Director, United Cerebral Palsy Associations, Inc. (UCPA, Washington, DC) 1995–1998

Lead spokesperson on assistive technology and systems change issues; lead staff to *Infinitec, Inc.*, a project to advance access to technology for persons with disabilities. Project Executive to *Access AmeriCorps*, a national technical assistance effort to increase the recruitment and inclusion of young people with disabilities in community service projects, and for the *Consortium on Assistive Technology Funding and Systems Change*, which provided information, training, and technical assistance to individuals with disabilities in all 50 states.

Deputy Executive Director UCPA 1990–1995

Deputy Executive Director in the areas of program, government relations, affiliate relations, training, volunteer development, and special projects and demonstrations. Developed grant and foundation support for national projects to enhance leadership; co-chaired the *National Coalition on Aging and Disability*. Served on the: Board of Directors Member of *Winners on Wheels*, a national nonprofit group to build leadership and independence in youth with disabilities through community service and entrepreneurship opportunities; Advisory Board Member to the *Universal Access Project* to build accessibility to the information superhighway for all users, including those with disabilities.

UCPA – Director of the Community Services Division 1986–1990

Involved in program and policy development for persons with severe disabilities at the local, state, and national levels. Directed: Governmental Activities at the federal level for 185 affiliates; seven federal grants providing program demonstration, policy analysis, training, and technical assistance in the areas of employment, assistive technology, family support, and community inclusion. Co-chaired the *Consortium of Citizens with Developmental Disabilities Task Force on Housing*; served on other task forces and advisory boards to numerous centers and organizations.

UCPA – Director of the Governmental Activities Office 1984–1986

Served as lead staff on special education, vocational rehabilitation, technology, and housing issues at the federal level; co-founded the *National Coalition on Technology and Disability* to increase visibility of assistive technology issues before federal decision makers; established Governmental Activities Leadership Institute to provide legislative advocacy and policy analysis training opportunities; influenced successful passage of amendments to the Rehabilitation Act on assistive technology and supported employment.

U.S. Senate – Legal Counsel to the Small Business Committee 1983–1984

Provided staff support to the Subcommittee on Entrepreneurship; investigated and developed reports on various small business problems; provided legal advice to the Senate Subcommittee on Disability Policy in drafting legislation and conducting oversight hearings on the civil rights of persons with disabilities and employment and educational issues.

Joseph P. Kennedy, Jr. Foundation – Assistant Director 1982 – 1983

Reviewed and analyzed application requests for innovative program development for persons with intellectual disabilities; developed concept papers for new initiatives in community living, employment, and public education.

U.S. Senate – Legal Counsel to the Subcommittee on Disability Policy 1981–1982

Reviewed and analyzed pending legislation and administration budget proposals that impact individuals with disabilities; arranged hearings to establish a record for Congress on the national need for a comprehensive community residential system to support persons with intellectual disabilities; arranged oversight hearings on the Developmental Disabilities Act that lead to reauthorization.

Georgia Association for Retarded Citizens (College Park, GA) – Executive Director 1977–1981

Provided support and technical assistance to 90 local chapters concerning unit and leadership development and the rights and needs of citizens with disabilities; directed governmental affairs activities and developed legislation on guardianship, and community residential services; served as governor's appointee on the Georgia DD Council and the Governor's Advisory Council on Mental Health and Mental Retardation.

Publications

Study on the Financing of Assistive Technology Devices and Services for Individuals with Disabilities. A Report to the President and the Congress of the United States. March 1993. (NCD.GOV)

Real Choices, Real Jobs: Employment for Individuals with the Most Significant Disabilities.

A Report of the Presidential Task Force on Employment of Adults with Disabilities. February 2001.

Review of State Plans for the Workforce Investment Act from a Disability Policy Framework.

Policy analysis and report with trends identification and recommendations for monitoring and oversight.

A Report to the Presidential Task Force on Employment of Adults with Disabilities.

March 2001.

Coauthor of NCD Study of Long-Term Services and Supports Financing and Systems Reform. 2005.

Coauthor of NCD Study of Financial Incentives for Persons with Disabilities. 2007.

Contributing author to *Educating Democracy: Tax and Financial Service Needs of Working Americans with Disabilities.* October 2006.

Co-Author of *Financial Capability of Adults with Disabilities – Findings from the FINRA Investor Education Foundation 2012 National Financial Capability Study.* 2014.

Co-Author of *Banking Status and Financial Behaviors of Adults with Disabilities: Findings from the 2013 FDIC National Survey of Unbanked and Underbanked Households.* 2015.

Co-Author of *Banking Status and Financial Behaviors of Adults with Disabilities: Findings from the 2015 FDIC National Survey of Unbanked and Underbanked Households.* 2017.

Co-Author of *Financial Inequality: Disability, Race and Poverty in America.* 2017.

Co-Author of *Financial Capability of Adults with Disabilities – Findings from the FINRA Investor Education Foundation 2015 National Financial Capability Study.* 2017.

Co-Author of *Banking Status and Financial Behaviors of Adults with Disabilities: Findings from the 2017 FDIC National Survey of Unbanked and Underbanked Households*. 2019.

Co-Author of *Closing the Disability Gap: Reforming the Community Reinvestment Act Regulatory Framework*, 2019.

Co-Author of *Race, Ethnicity and Disability: The Financial Impact of Systemic Inequality and Intersectionality*. 2020.

Co-Author of *The Extra Costs of Living with a Disability in the U.S.—Resetting the Policy Table*. 2020.

Co-Author of *The Extra Costs Associated with Living with a Disability in the United States*. 2020.

Co-Author of *Rethink Public Policies to Support Income Production, Savings and Asset Accumulation for People with Disabilities*. 2021.

Co-Author of *Overcoming Systemic Financial Exclusion of People with Disabilities in CRA and CRA Modernization*. 2021.

Co-Author of *Disability Reparations and the Modernization of the Community Reinvestment Act of 1977*. 2022.

Research

“Asset Accumulation and Tax Policy Project,” funded by U.S. Department of Education, grant No. H133A031732, 2003-2008.

“Asset Accumulation and Economic Self Sufficiency (AAESS) Project” funded by NIDRR, 2008-2011.

“Rehabilitation Research and Training Center (RRTC) on Workforce Investment and Employment Policy for Persons with Disabilities,” funded by U.S. Department of Education, National Institute on Disability and Rehabilitation, grant No. H133B980042-99.

“Long-Term Services and Support Financing and Systems Reform,” funded by the National Council on Disability, 2005.

“Livable Communities Follow-up,” funded by the National Council on Disability, 2005.

“National Disability Technical Assistance Consortium on Employment of Adults with Disabilities,” funded by the Office of Disability Employment Policy (ODEP) of the U.S. Department of Labor.

“National State-to-State Technical Assistance Program for Community Living,” funded by Center for Medicare and Medicaid Studies.

“I.T. Works: Barriers, Facilitators and Strategies for Promoting Quality and Successful Employment and advancement of Individuals with Disabilities in the Information Technology Industry,” funded by US Department of Education, grant no. H133A011803

“Information Technology Technical Assistance and Training Center (ITTATC),” funded by National Institute on Disability and Rehabilitation Research (NIDRR) of the U.S. Department of Education (cooperative agreement #H133A000405).

“Technology for Independence: Community-Based Resource Center (TI-CBRC),” funded by National Institute on Disability and Rehabilitation Research (NIDRR) of the U.S. Department of Education (NIDRR grant H133A021801)

“Technical Assistance to Disability Program Navigators and Work Incentives Grantees,” funded by Employment and Training Administration in the Department of Labor, 2001 – 2008.

“Center for Effective Rehabilitation Technology Service Delivery (CERT)” funded by National Institute on Disability and Rehabilitation Research (NIDRR) of the U.S. Department of Education, 2010-2014.

“Technical Assistance to States under the Disability Employment Initiative (DEI)” funded by the US Department of Labor, 2010 to 2020.

“Southeast ADA Center” funded by National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) of the U.S. Department of Health and Human Services, 2006-present.

“ABLE National Resource Center: Education and Outreach” funded by Bank of America and the Prudential Foundation, 2015-present.

“ABLE Accounts and Financial Coaching Strategies to Increase Employment and Community Participation” funded by National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) of the U.S. Department of Health and Human Services, 2018-present.

“Rehabilitation Research and Training Center on Disability Inclusive Employment Policy” funded by National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) of the U.S. Department of Health and Human Services, 2020-present.

“Rehabilitation Research and Training Center on Employment Practices” funded by National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) of the U.S. Department of Health and Human Services, 2021-present.

“Small Business Ownership by People with Disabilities: Challenges and Opportunities” funded by JPMorgan Chase & Co., 2020-2022.