

Curriculum Activities, Discussions, and Exercises

Activity: Introduction

Use this activity at the start of your meeting to break the ice and learn more about your audience. Use the information gathered to guide your meeting going forwards.

Instructions for attendees:

- Share your name
- Your organization and your role with the organization
- Please share how you first learned about NC ABLE
- What do you hope to learn today?



NC ABLE Advocates Training



Activity: Opening an ABLE Account Group Presentation

This activity allows attendees to learn about opening NC ABLE accounts through their peers and by teaching.



Instructions for attendees:

- Each group will present for 2-3 minutes on each section– refer to your companion guide and slides;
- Each person in the group will need to contribute to a portion of the presentation;
- Each group will need to include the following in their presentation:
 - Overview
 - Key Elements
 - Examples
 - Include a visual element or skit
 - Potential Challenges



Activity: Authorized Agents Scenarios

This activity allows attendees to think through how the levels of authorized agents will apply to a range of situations. It also presents an opportunity to consider and workshop potential challenges in explaining the levels.



Instructions to attendees:

- Each group will design a scenario to explain the levels of authorized agents;
- Each group will need to include the following in their scenario:
 - Compelling story
 - Detailed description of the authorized agent and account owner

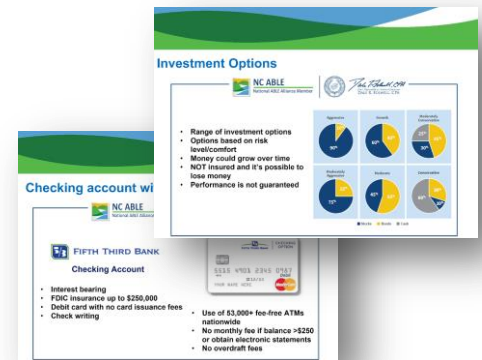
— Potential Challenges

Discussion: Making the Distinction

Attendees use this opportunity to discuss the differences between the two types of NC ABLE accounts, thus strengthening their understanding of both.

Discussion questions:

- What are the key differences between the two options?
- What is the impact of the differences?
- What are some potential challenges posed by the difference?



Activity: Contributions Group Presentation

This activity allows attendees to learn about contributions to NC ABLE accounts through their peers and by teaching.

- Each group will present for 2-3 minutes on one contribution – refer to your companion guide and slides;
- Each person in the group will need to do a portion of the 2-3 minute presentation;
- Each group will need to include the following in their presentation:
 - Overview
 - Key Elements
 - Examples
 - Include a visual element or skit
 - Potential Challenges



Discussion: Qualified Disability Expenses (QDEs)

Attendees gain a better understanding of QDEs through workshop and real-life examples.

Discussion questions:



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- What are some things that would be considered QDEs?
- What are some things that would not be considered QDEs?

Activity: NC ABLE Training Comprehensive Exercise

Read the stories in groups or as a class and discuss how the individuals and their families benefit from the NC ABLE program.

Exercise 1: Betsy Loving's Story

Betsy is 10 years old. She was diagnosed with intellectual and developmental disabilities as a toddler. Betsy does not receive SSI or Medicaid. She hopes to live independently someday. Mr. and Mrs. Loving encourage Betsy's independence and want to save for her future, especially after they are gone. They have established a Special Needs Trust for Betsy, but it does not permit funds to be used for housing. The Lovings taught their other children how to save, but they are unsure where to begin with Betsy.

- How can Betsy and her family benefit from the NC ABLE plan?

Exercise 2: Cameron Jolly's Story

Twenty-eight-year-old Cameron has physical disabilities. He attends the local community college and is working for a small computer company. Cameron would like to save for a home of his own and for his retirement. Unfortunately, his employer does not contribute to a defined contribution retirement plan. In addition, Cameron fears that he would lose his SSI benefits and Medicaid if he takes on a second job to meet his financial goals.

- How can NC ABLE help Cameron meet his financial goal?

Jordan Sir Friendly's Story

Jordan is a 30 years old gentleman with intellectual and developmental disabilities. He has a General Guardian but lives at an assisted living facility. Jordan's support coaches help him meet his everyday needs. However, Jordan's dream is to save and manage his own expenses one day. His guardians support Jordan's quest for independence. They helped Jordan secure a part-time job, and he uses this income for his savings. Jordan also receives SSI income, which he uses to pay for his vocational and living expenses. Jordan and his guardian feel there is more they can do to save for Jordan's future, but they do not know where to start.

- What benefits from the ABLE program would you share with Jordan and his guardian?

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