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ABSTRACT

This report discusses the results of a case study of Working Order, a Pennsylvania program designed to develop entrepreneurs with and without disabilities by sharing the expertise, resources, and skills of small business owners. The strategy of the program is to invite competitive entrepreneurs, those who could likely produce and sell their services or products on the open market, to share space with and support entrepreneurs who would likely not be able to compete in the marketplace due to their disabilities. The report describes how the program was started, its organizational structure and financing, its location in a former high school that has been converted to a community center, advantages to members, the business plan, and mentorships. Support strategies and three member profiles are discussed. Experiences with cooperative entrepreneurship, the importance of a well-developed mission statement, advantages of entrepreneurship for people with severe disabilities, ways to by-pass traditional funding and regulatory mechanisms, and the benefits of mutual support are also addressed. The report closes with a discussion on the challenges that Working Order is facing, including enticing competitive entrepreneurs. (CR)

**IT'S ALL BUSINESS: A SITE VISIT REPORT
ON WORKING ORDER, SHARPSBURG,
PENNSYLVANIA**

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Introduction

Working Order, located in the business district of Sharpsburg, Pennsylvania, is a non-profit business incubator with an innovative and promising thrust: To develop entrepreneurs with and without disabilities by sharing the expertise, resources, and skills of small business owners. The strategy of this venture is to invite "competitive entrepreneurs"--those who could likely produce and sell their services or products on the open market--to share space with and support, entrepreneurs who would likely not be able to compete in the marketplace due to their disabilities, yet have skills to offer.

This case study is based on a site visit in November 1997. It is part of a series of reports on strategies for promoting integrated, meaningful daytimes for people with severe disabilities. An option becoming increasingly available to people with disabilities is self-employment. This case study highlights one organization's efforts to promote this option.

Early in 1996, Working Order was created with the express purpose of helping people to develop their own businesses. The founder and director of this organization was motivated to start this new service by three distinct observations. First, she noted that the employment history of a friend who has a brain injury had been very fragmented. Second, she saw that the high cost of supported employment services

meant that many people with disabilities were excluded. Third, she realized that the very real threats to government programs could easily curtail the vocational futures of people with disabilities. Clearly, there were other ways for people who needed support to participate in meaningful and remunerative work.

As a long-term rehabilitation professional, the director saw that people were often "in the system" for years. She was aware of the tremendous amounts of money that were being poured into cognitive rehabilitation programs for people with brain injuries. Many people benefited from these programs but were still unable to work successfully. Individuals would work for brief periods of time, lose their jobs, then wait a long time for the next job. The director thought that if people worked for themselves, they would have much more control of their work life than they did as marginal employees. In this way, individuals would not have to be concerned with imposed work schedules, production demands, lay-offs, or minimum wage requirements. They could capitalize on their strengths, work at their own pace, and develop real work skills. In addition, such a scheme would be cost-effective. People who needed extra help in order to work successfully would be coached and supported by other entrepreneurs. The primary activity of Working Order would be business, not service.

Getting Started

Working Order filed articles of incorporation in October of 1996 and received 501(c)(3) tax exempt status soon thereafter. Early in the project, the director hired a woman to be the part-time office manager and community organizer. The office manager, who had sustained a spinal cord injury 14 years previous, is a former

teacher. Like many women, she has a strong volunteer history. As the former president of a very active and prestigious Jewish women's organization, she had proven skills in organizing and community relationships. This charismatic and dynamic person is the sole paid employee of Working Order.

One thing the director feels that she did very well was to pick an excellent volunteer Board of Directors. The board is diverse in skills and backgrounds. It includes an accounting expert, a grant writer, an attorney, and a psychologist, as well as several people in fields such as business, information management, and finance. One third of the board members have disabilities, and several others have family members with disabilities, so the group has high level of awareness of disability issues.

Originally, the director anticipated that overhead expenses would eventually be covered by rental fees paid by individual entrepreneurs. However the nondisabled entrepreneurs who have wanted to join Working Order have typically been low income individuals who need assistance with their fledgling businesses. The director has considered an arrangement wherein nondisabled entrepreneurs "pay" Working Order for space and supports by offering in-kind services rather than through monetary arrangements. These services could take the form of direct support, on-the-job training, or mentorship of other entrepreneurs. Indeed, in one situation this type of in kind service has already been attempted with success.

Working Order's early experiences in assisting new entrepreneurs indicated a strong need for an educational component to help individuals build business expertise. Monthly seminars and self-training resources have been added to Working Order's

services. Additionally, the director is recruiting student and faculty volunteers from the area universities to assist Working Order in its development. Some areas of concern are pursuing health insurance for member entrepreneurs and securing skilled community mentors for each member.

At present, Working Order has seven entrepreneurs; one who does not have a disability, and six who do. Of the six, several would be considered "competitive." Each entrepreneur is at a different stage of business development. Two former members of Working Order left, having decided that running their own business was not for them.

The director affirms that all people are welcome at Working Order. Because cooperative work is critical to the long term success of the business, some self-direction is needed. Although none of the entrepreneurs have required full time aides or coaches so far, people have the option of bringing along their own support. Assistance is provided as needed by the staff, other entrepreneurs, and others.

In retrospect, the director realizes that there are many things that she had not considered when she launched Working Order. She had not realized that insurance would be so costly, nor had she considered the ramifications of various government regulations on the implementation of the plan. She feels that, in a way, this was fortunate. Perhaps she would not have gone ahead with the project had she realized the obstacles she would encounter.

Organizational Structure and Financing

Working Order incurred approximately \$4,400 in start-up expenses. The director and office manager solicited approximately \$12,000 in donated equipment and

furnishings. In addition to donating her time, the director underwrites the day to day operating costs. Seed money for the project was provided through a grant from the Center for Applied Neuropsychology. This grant doesn't quite pay for all of the overhead, and the director puts about two-thirds of her salary into Working Order to keep it going. She estimates that to cover all costs, the organization will require about \$80,000 annually. Overhead costs include: rent, telephones, and property and liability insurance. The director and board are actively pursuing other grant money to sustain Working Order over the long run.

Recently, Working Order underwent a complete and successful audit. This put the organization in a good position for the development of grant proposals, and for approaching foundations. The president of the board, an expert at not-for-profit finances, believes strongly that Working Order has long term sustainability. Finding grant money, and then long term hard money, are two immediate goals of the organization. The board president stated that, although Working Order looks like a simple organization to an outsider, in reality it is extremely complex. Because entrepreneurship as an option for people with disabilities is a relatively new concept, a challenge facing the director and board is the need to figure out how to articulate Working Order's mission to prospective funders. It does not readily fall into any existing business or human service category.

Working Order provides business counseling to vocational rehabilitation clients on a fee-for-service basis. This provides a predictable stream of funding while adhering to the vision of the organization. This funding could potentially help to support 10 to 12

entrepreneurs. Still, the director is cautious. She is resistant to becoming a human service provider, so perceives potential drawbacks in this type of relationship with the vocational rehabilitation system.

The Location and Space

Working Order is housed in a former high school that has been converted to a community center. The community center is located in the heart of a prime business district about 15 minutes from downtown Pittsburgh. The building itself is a handsome, two-story brick structure. There is a wheelchair lift to the main floor where Working Order is located.

The Fox Chapel School District, which owns the community center, has been responsive to the needs of the organizations that use the facility. For instance, accessible bathrooms were installed in a timely manner when the director of Working Order requested them, and the wheelchair lifts are kept in fine repair. The building is maintained by the school district, has free parking, and is located on an accessible bus line. The school district charges Working Order very reasonable rent for its space.

In addition to Working Order, the center houses a public library, a senior center, and two pre-schools; one for hearing impaired children, the other for children with and without disabilities. One unfortunate aspect of the location of Working Order is its juxtaposition with the day care centers with which it shares the main floor. Although the children do not pose any problem, the evidence of small children in the shared hallway--colorful artwork, little coats, children's voices and songs--although very pleasant, seem incongruous in a business setting.

Once inside Working Order, the atmosphere and appearance are "all business." The office space itself is divided by walls and partitions into several semi-private office areas. The reception area is appointed with two nice wooden desks. Beyond the entrance are offices and a conference room. These are laid out in a design that is pleasing and that minimizes distractions. Carpeting and walls are neutral, and the office furniture and equipment, all received from other businesses as donations, are in very good condition.

Advantages to Members

Working Order has many benefits that would appeal to the originator of a new business. Parking is free and the location is excellent. Offices are quite pleasant, and office equipment such as fax machines and copiers are available to all participating entrepreneurs.

A very attractive feature of Working Order is the continuous marketing efforts on behalf of member businesses. Marketing services include assistance with locating leads and advertising goods and services. The director and office manager also assist members with the strategic aspects of marketing. The two provide consultation services to new entrepreneurs, helping them with trouble-shooting and long-range planning.

Working Order offers no "services" or "service providers" in the traditional sense. Instead, those who require some extra help are assisted by the director, office manager, or others. Eventually, assistance will be provided through a mutually beneficial arrangement between entrepreneurs.

In exchange for all of the perquisites offered by Working Order, competitive entrepreneurs are asked to make two commitments: (1) to assist those who need extra support, and (2) to subcontract work to “noncompetitive entrepreneurs” whenever possible. This work could take the form of preparing mailings, copying, and other tasks. This arrangement will hopefully result in all entrepreneurs “growing” their individual businesses while sharing skills, resources and labor.

The Business Plan

A key service of Working Order is assisting members to develop a business plan. The first step in that process is the completion of the *Business Start-Up Strategy Audit*. The *Strategy Audit*, developed by one of the board members of Working Order, is designed to help individuals to examine their interests and skills as they relate to the marketplace. The audit may take some time to complete, but every member will go through this process as a first step in developing a written business plan.

The *Strategy Audit* guides prospective entrepreneurs through a process of discovering who their prospective customer base might be, whether the proposed business will be profitable, and the time that will be required for the entrepreneur to meet her or his stated goals. A thorough examination of what the product or service will be, the demand for the product, marketing strategies, estimates of start-up costs, and benchmarks for success are also covered by the *Strategy Audit*. Lastly, an analysis of strengths and weaknesses of the plan are covered. Generally, one of two outcomes results from the audit process; either a prospective entrepreneur begins the first stages

of business development, or decides that working for him- or herself is not so appealing after all.

Mentorship

The director of Working Order envisions eventually matching each of the new business owners with a "mentor." This person would ideally work in a similar field, and have experience with the business needs and market of the members' areas of interest. Mentors are being sought through area businesses and universities.

Support Strategies

To fully support new entrepreneurs, the staff of Working Order have tapped a variety of community resources. For example, at times members require more training and support than can be provided by the director, office manager or other members. It is in these situations that volunteers have been extremely helpful.

Although vocational rehabilitation might agree to provide a job coach to help people with specific tasks, the director is hesitant about using this resource. She is determined that Working Order be a regular work place where people learn from each other in the office rather than from human service workers. The director asserted that job coaches tend to be ever-present and frequently idle. Most people with disabilities do not need support constantly. Instead, they might need someone to assist them ten minutes out of every hour. A person who is already working in the environment would be the most logical source of assistance. The director expressed an additional concern; that is, the potential economic ramifications of job coaching. If the job coach is restricted to one individual, the cost effectiveness is limited. However if a person

already on site can be funded to provide coaching intermittently, perhaps another entrepreneur, such support could be quite cost-effective.

Member Profiles

Entrepreneurs at Working Order have each experienced the world of work differently. Many of them were former participants in the vocational rehabilitation process. Some personally encountered obstacles to success in more traditional job placements. Several entrepreneurs approached Working Order with a definite plan. These members knew that they wanted to work for themselves, and have been satisfied with their successes. Others tried entrepreneurship and decided that they did not have the patience or internal drive needed to sustain a business venture.

Below are the stories of three individuals who are supported by Working Order. They are at a different points in the development of their businesses, and each member has required very different supports.

Michelle

A trained medical transcriptionist, Michelle formerly did transcription work for a chiropractor out of her home. Her work situation isolated her from both social and potential business contacts. In fact, it was Michelle's work situation that prompted the director to create a small business incubator that included entrepreneurs of various abilities and interests.

Although she has use of only one hand due to her brain injury, Michelle can type easily and accurately from audiotapes. Michelle continues to work for the chiropractor but has taken on some new projects since becoming a member of Working Order.

Recently she completed a project with a not-for-profit organization. This contract, procured with the help of Working Order, required Michelle to coordinate and generate mailings for a conference. She maintained a list of conference attendees, created labels for mailings, entered new names as people enrolled for the conference, then transcribed the proceedings and mailed them to conference participants.

Whereas Michelle requires little support in her usual transcribing duties, when learning new tasks such as the conference coordination described, she requires support. In order to fulfill the contract, Michelle needed to learn a number of new skills including mastering a new data base program. As a member of Working Order, she received teaching and assistance for specific tasks as needed.

Michelle's work is considered non-competitive due to her slow rate of production, yet those who contract with her rely on her consistent and accurate work. Michelle bills her customers by the page in order to compete with other transcriptionists. She needs to work at her own pace and prefers to be self-employed.

Working Order worked hand-in-hand with traditional services to support Michelle's venture. For example, vocational rehabilitation provided Michelle with a transcription machine that she can use in the office. They also bought her a fax machine so that customers can receive their transcripts and return corrections quickly.

Mark

Mark has a brain injury. He is college educated, quite articulate, and very comfortable with computers. Mark, originally from Kentucky, found Working Order through an Americans With Disabilities Act (ADA) coordinator. He relocated to

Pennsylvania with the sole purpose of joining Working Order and starting a consulting business.

At the time of our interview, Mark was just getting started on his business plan. He is interested in marketing new technologies and incorporating them into communications and advertising. Mark knows how to create web pages and how to do user support; that is, how to train people in the use of technology.

As part of developing a business plan, Mark needs to find his marketing “niche” in Pittsburgh. He has been attending the area Rotary Club breakfasts, where he has made a number of good business contacts. In addition, Mark goes to a “bridge-building” meeting every month where he networks with non-profit business people.

Joann

In the past several years, Joann has experienced problems with balance, visual changes, and limited endurance. Her neurological impairment is unidentified. Because she has not received an “official” diagnosis, Joann has not been eligible for government benefits such as vocational rehabilitation, Social Security, SSI or Medicaid. Over the past four years she has been unable to work in her usual occupation as a teacher due to her disability. Joann was attracted to starting her own business because she felt that it would allow her to pace the work according to her physical needs.

Originally, Joann approached Working Order with the thought that she would develop some kind of home health respite service. Completing the *Strategy Audit* with Working Order staff helped Joanne to decide that her original idea, if actualized, would result in work that would be too physically demanding for her. With the assistance of

Working Order staff, she developed an alternate business concept: a telephone follow-up service. She plans to expand her services to include telephone checks for latch key children, recently released hospital patients, and senior citizens living alone.

Joann's first opportunity to try this new business came through a grant project that was located by Working Order staff. This project involved contacting by telephone potential participants for a research study. Due to her pleasant voice and warm demeanor, Joanne was extremely successful as a "recruiter."

Self-employment appears to be an excellent option for Joann. As an entrepreneur, she can decrease her hours and activities during periods of fatigue and pain, and take on more contracts when she is feeling particularly well.

Working Order has provided services to people with various disabilities including brain injuries, neurological impairments, and mental retardation. Entrepreneurs have started a variety of businesses. One worked as a colorist and assembler for a card company, another is a technical writer. Some members have stayed at Working Order and others have moved on.

Members use the space and services of Working Order in ways that best meet their needs. One member meets his customers at Working Order offices, but conducts most of his resume service business from his home. Several are in the process of developing business plans. They meet with Working Order staff regularly.

At Working Order, an explicit expectation is that entrepreneurs will not continue to need services indefinitely. Although the supports and services provided by Working

Order are not time limited, there is an understanding that most members will grow out of them.

Experiences with Cooperative Entrepreneurship

Below are several key points of learning that emerged from our visit to Working Order. These include: the importance of a well-developed mission statement, advantages of entrepreneurship for people with severe disabilities, ways to by-pass traditional funding and regulatory mechanisms, and the benefits of mutual support.

Importance of Mission

Although people with less severe disabilities have been encouraged and assisted to start their own businesses through vocational rehabilitation services, people with more significant support needs have not shared this opportunity. Working Order has broken new ground in this area. Entrepreneurship is a relatively new idea in employment for people with significant disabilities. As such, accurately defining the mission of an organization like Working Order is an important first step toward gaining funding as well as community recognition. The director expressed the mission of Working Order as follows: **“To support entrepreneurs with disabilities in an integrated setting, building social contacts and business skills.”**

A formal mission for Working Order had not been developed at the time of our visit.

The director, board president, and office manager agreed with us that the development of a strong mission and vision for the organization is a critical step. Although the leadership of Working Order is quite clear about what the agency is and what it does, it is important to refine an agency mission, perhaps during a retreat.

Advantages to Consumers

Many people with disabilities “fall through the cracks” after vocational rehabilitation services end. Most vocational services are time limited. Even options that promise long-term services, such as supported employment, do not guarantee continuous services or multiple job placements. Further, not everyone fits comfortably into a traditional job. Many people with and without disabilities prefer self-employment. Entrepreneurship provides people with and without disabilities the opportunity to explore their interests and to capitalize on their talents. With the provision of appropriate “natural supports,” entrepreneurship can provide a stable means of ongoing employment.

The process of self-discovery is a dynamic one. Within traditional vocational rehabilitation services, consumers are asked to set a vocational goal, and to stick with that goal. Changing jobs is discouraged. As a consequence, many people end up staying in jobs that do not meet their needs, or quitting their jobs and waiting a long time to be placed again. Members of Working Order found that their original ideas about what form their businesses would take changed considerably as they went through the process of “auditing” their concepts.

Members found that they came in doing one thing, and end up doing something else entirely. For example, a “competitive” entrepreneur came to Working Order to refine her resume. She ended up dedicating a lot of time to members in the form of teaching in exchange for the assistance she is received with job hunting.

Alternate Funding Options

An agency such as Working Order provides a support system that by-passes dependency on government programs. The types of services and supports provided at Working Order are generic. A person doesn't need to have a disability to require these types of supports, and assistance is provided based on specific support needs, not disability label. The support and feedback provided by other members reduces feelings of isolation. Discussing business goals with other entrepreneurs can also be helpful for sustaining motivation and for learning more about the process of running one's own business.

Mutual Support

Most people would find starting their own business to be a daunting task. One would need to confront both complex issues, such as business plan development and marketing, and more mundane problems like learning new tasks. Supports provided through Working Order assist members with these as well as with less apparent problems. For example, members found that it was difficult for them to set a fair price for their services; that they tended to undersell themselves. The input of Working Order members and staff has helped members to realistically assess the value of their work.

Toward the Future: Challenges

Working Order is moving away from traditional systems of support, seeking instead to build mutually beneficial relationships between entrepreneurs. In this regard, the organization is unique.

A new agency needs to strike a balance between building the organization and examining why the organization is being built. The director of Working Order stressed the importance of maintaining a clear focus through this period of development. The board and staff felt the need to continually evaluate decision-making in light of the ultimate goal of the agency: To support members with and without disabilities toward cooperative, fiscally sound, and beneficial relationships with each other and the larger community.

Enticing competitive entrepreneurs has been a struggle for Working Order. Some of the office space remains empty. Marketing the services available through Working Order to competitive entrepreneurs is a major goal within the organization. The director is confident that new businesses owners will join the cooperative as they learn of its successes. She has had numerous inquiries, some quite serious. As she puts it, she is "proceeding cautiously" to assure that all entrepreneurs understand, and support, the cooperative nature of the venture.

The long term plan of Working Order is to replicate offices in different locations, keeping each a small, manageable site. This will provide opportunities for many individuals, while maintaining small setting with very personal supports. The concept for Working Order is that the Sharpsburg site will eventually host 20 businesses; eight on site and 12 additional businesses off-site. That goal being met, additional incubator locations will be sought. These sites will be geographically dispersed with the aim of maintaining a neighborhood presence. Twenty percent of the entrepreneurs are slated to be noncompetitive, while 80% are projected to be competitive.

Working Order is strictly business--the emphasis is on the development of individual companies. The concept both fascinates and challenges with its vision of cooperation and accountability. The long term success of Working Order will depend upon on the interdependency of its members. As the director put it "each person is responsible to make it a success."

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