



Employment Summit Summary

FINAL REPORT

Achieving Successful Employment Outcomes
for SSDI and SSI Beneficiaries:
Transforming Ideas into Action Plans

June 12-13, 2019

Social Security Administration
Woodlawn, MD

BACKGROUND

In June 2019, Social Security hosted a two-day event on-site at Social Security headquarters in Woodlawn, Maryland. The purpose of the Summit was to engage employment experts in a discussion about effective strategies that support successful employment programs and outcomes for adult Social Security beneficiaries with disabilities.

To encourage participant discussion, Social Security invited a limited number of Employment Network (EN) and Vocational Rehabilitation (VR) service providers representing a cross-section of program services and supports.

Attendees included:

- Social Security’s executive leadership from:
 - Office of Retirement and Disability Policy
 - Operations
- Federal leadership: Department of Labor, Department of Health and Human Services, and Department of Education.
- Ticket to Work (Ticket) program stakeholders:
 - ENs and State VR agencies
 - Ticket Program Manager (TPM), Council of State Administrators of Vocational Rehabilitation, Virginia Commonwealth University, and the National Disability Rights Network

A full list of attendees and the agenda are included at the end of this report.

The agenda for the two days included a blend of expert presentations, panel discussions, and roundtable sessions where all attendees were encouraged to share their thoughts. These activities were aligned to the benchmarks associated with a beneficiary’s participation in the Ticket program:

- Increasing Program Participation
- Improving Supports and Services
- Increasing Employment Entry
- Increasing Employment Retention

- Increasing Transition into Self-Sufficiency

This report includes high-level discussion points and themes, both general and specific, to the five phases above.

HIGH LEVEL THEMES

This section reflects the recommendations of Summit participants, not Social Security or its contractor.

General

- Overall improvements in communication
 - Social Security’s communications with beneficiaries
 - Notice language to beneficiaries should be reviewed and, where possible, clarified and simplified using plain language. Language tone in notices should be softened to be less threatening to beneficiaries.
 - Social Security should consider the inclusion of information pertaining to return to work programs earlier in the disability application and award process, and inform beneficiaries that authorized Ticket program service providers may contact them offering services and supports.
 - Provide training for local Field Office staff on SSA’s return to work programs to enhance communication to individuals filing for benefits and to disabled beneficiaries.
 - Distribute electronic newsletters and email blasts to existing and potential clients.
 - Service Providers’ communications with employers
 - Let employers know about tax credit incentives such as WOTC, which provides employers with incentives to hire SSI beneficiaries, perhaps by providing business cards for Ticketholders to share with other community providers.

- Social Security’s communications with service providers
 - Social Security should provide advanced notice to service providers pertaining to policy or procedure changes.
 - Social Security should alert service providers before TPM conducts outbound call campaigns to beneficiaries (for example, outbound calls to newly eligible beneficiaries or Ticketholders that have recently had successful VR case closures). This would allow the service providers to prepare for incoming inquires.
- Social Security should consider broadening the focus of the program to be more inclusive of part-time work and change the structure of the program to remove the disincentives providers have with working with the Supplemental Security Income (SSI) population.
- Social Security should consider changing the EN Payment model so that all beneficiary earnings are counted consistently (pay date vs. pay period date). Currently, beneficiary earnings are calculated based on either the month that the pay was earned or the month that the pay was received from the employer, depending on what type of payment is being requested and what type of benefits program the Ticketholder is on.
- Social Security should consider pursuing legislative change eliminating the “cash cliff” for SSDI beneficiaries, making the SSDI cash benefits adjust to work and earnings on a sliding scale, similar to the SSI benefits system. Such changes have been tested in the Benefit Offset National Demonstration and Promoting Opportunity Demonstration.
- Most attendees emphasized the importance of collaborating with a variety of partner organizations. Service providers should establish relationships with as many other area stakeholders (community organizations, local government, etc.) as possible. Specific attention

was paid to the importance of collaborating with Workforce Boards. The representative from the Department of Labor encouraged attendees to follow up with him directly for advice on how to contact their local workforce agency. SSA should develop a coordinated strategy with DOL to connect ENs with workforce agencies.

Program Participation

This portion of the event focused on both outreach to beneficiaries and successfully encouraging beneficiaries to participate in the Ticket Program. Primary themes and ideas discussed included:

- Service providers would like to have access to more beneficiary data such as contact information, current benefits status, and any work incentives used.
 - Social Security should provide access to this information by including this in the Ticket Portal. SSA should also include updated beneficiary mailing addresses in the Provider Portal.
 - Social Security should work to expand the EN Marketing Pilot to additional providers. ENs already participating find the beneficiary contact information very helpful, although the accuracy of the information contained in the files should be reviewed by SSA.
- Many attendees have success using motivational interviewing techniques with prospective clients. They recommend that other service providers do the same. One attendee referenced an online directory of materials that includes thorough training on the technique. The site is the National Clearinghouse for Rehabilitation Training Materials (ncrtm.ed.gov).

Supports and Services

- ENs need to better use the data they are collecting (incoming call volumes, placement successes) to improve service. SSA would like

to engage and support ENs in this effort and potentially use communication platforms to share this data.

- ENs need more training and development opportunities beyond the basic training that TPM currently provides for new ENs or new staff.
- Social Security should create a communication platform between ENs and VRs to share tips, ask questions, and learn from each other.
- Attendees agreed on the importance of benefits counseling throughout the entire relationship with the client. SSA will continue to build training capacity for ENs and VRs to receive free benefits counseling training through its Virginia Commonwealth University (VCU) training program.
- Service providers recommend SSA take steps to improve communication between the Office of Research, Demonstration, and Employment Support (ORDES), service providers, and Operations stakeholders such as Area Work Incentives Coordinators (AWICs) and Work Incentive Liaisons (WILs) designed to promote and strengthen information about the Ticket to Work program and return to work issues among field components.
- Social Security should update the Benefits Planning Query (BPQY) and find alternative ways to provide a centralized source for beneficiary benefits information to service providers. Ideally, this information would be made available in the Ticket Portal or in MySSA.

Employment Entry

- Perhaps most repeated was the advice to create and maintain close relationships with employers. This enables the service provider to understand the needs of the employer and determine if the client has the requisite skills necessary to succeed in the position.

- Recommendation for using the Workforce Boards or AJCs¹ as a conduit in reaching area employers
- Maryland VR described successful, innovative programs they have with large employers, such as CVS and Starbucks. These employers may be interested in applying this model into other areas of the country. Additionally, other similar initiatives may be in place with VRs nationally.

Employment Retention

- Many attendees stressed the importance of making sure the long-term employment expectations are made clear to the beneficiary from the point of intake.
- The group spent much time discussing collaborations in the context of employment retention. In particular, they stressed the importance of working with local support organizations for housing, transportation, childcare and other services that address issues that commonly lead to clients leaving their jobs.
- Close rapport with employers is also important for client job retention. The service provider can work with the employer to mitigate issues the client is experiencing in the job.

Transition to Self-Sufficiency

- Many attendees encouraged colleagues to establish relationships with client families and other support group members. Family buy-in on the client's self-sufficiency goals generally translates to better employment outcomes for the client.
- Social Security, service providers, and other stakeholders should more often highlight and promote beneficiary success stories.
- Many attendees focused on the importance of avoiding beneficiary overpayment.

¹ For a list of services by state, please see: <https://www.dol.gov/general/location>

- Social Security should find a way to allow wage information provided by ENs for Ticket purposes be used to drive benefits adjustments. Currently, earnings entered into SSA's iTOPSS (Internet Ticket Operations and Provider Support System) do not appear in other SSA databases. Additionally, when SSA Ticket Program Manager staff enter earnings into eWork, SSA field office staff still need to adjust benefits accordingly. A more streamlined automated process would prevent overpayments.
- Develop more and better ways for wage reporting in order to prevent beneficiary overpayments made due to Social Security having incomplete earnings information.

COMMUNICATIONS PLAN

A recurring question throughout the event was how the information discussed and the decisions made during these two days will be disseminated to the rest of the provider community and other stakeholders. The first step SSA is undertaking is to release this summary document covering deliberations and recommendations. Second, SSA will release a more comprehensive report document later in FY 2020.

NEXT STEPS

Social Security plans to undertake the actions in this section, subject to the availability of resources.

- Short-term programmatic changes – changes that can be implemented with a short time frame and require little to no additional resources; limited coordination with other components, etc. (within 12-18 months):
 - Explore Marketing Enhancements – Adding ENs to the initiative, adding text messaging capability and email enhancements. Share preliminary ORDES pilot data and provide feedback and best practices to pilot participants to improve pilot outcomes.
- Develop plans to increase outreach and engagement to Social Security regional and field staff designed to improve communication and understanding of SSA's Employment Support Programs.
- Identify methods and resources to share SSA area or regional contact information for Area Work Incentives Coordinators (AWIC) and a ZIP code directory for ENs to refer their clients to the correct local SSA Field Office.
- Provide more in-depth training, ongoing training for ENs beyond the initial trainings offered when ENs are first on-boarded.
- Intermediate initiatives – requires coordination with other components; additional resources; development of plans and timelines; etc. (within 12-24 months):
 - Explore opportunities to promote motivational interviewing.
 - Coordinate activities with Social Security field component staff and EN and VR stakeholders and with Social Security Office of Employment Support.
 - Explore options to share beneficiary data when VRs cannot serve a beneficiary on a waiting list (order of selection) with ENs so that they can receive services more timely.
 - Identify communication strategies that further promote the Ticket program to beneficiaries (including text messaging and email contact). Notify beneficiaries that Ticket Program ENs may make contact to dispel concerns regarding fraudulent contact.
 - Investigate centralization of workloads associated with the Ticket program, such as entering wage data, generating benefits planning queries, etc.

- Work with CSAVR to share and promote information related to successful examples of VR partnerships with large employers (Starbucks, CVS, etc.).
 - Long-term initiatives – may require research; coordination with other agencies/components; resources; etc. (within 36 months):
 - Coordinate efforts across federal programs to identify opportunities to leverage the Ticket program and partner to enhance return to work opportunities and efforts.
 - ACL Task Force collaboration – Increase efforts to engage Workforce and Centers for Independent Living (CIL) in the Ticket Program.
 - Engage RSA in promotion of Partnership Plus among VR and EN service providers – this is particularly beneficial for youth in transition as ENs can provide direct placement and follow up services.
 - Ticket Notice Language changes – identify and enhance current notice language; add language regarding return to work. Remove language from notices found to instill fear or confusion among beneficiaries.
 - Increase linkages to employers and jobs – explore a national job board database of beneficiaries where employers can access for jobs in a specific geographical location (evaluate the CSAVR Talent Acquisition Portal).
 - Evaluate functionalities that would allow ENs to market services directly to beneficiaries.
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ATTENDEES

Social Security

Dr. Mark Warshawsky – Deputy Commissioner, ORDP
Stephen Evangelista – Assistant Deputy Commissioner, ORDP
Dr. Katharine Bent – Associate Commissioner, ORDES
Susan Wilschke – Deputy Associate Commissioner, ORDES
Robert Pfaff – Director, ORDES/OES
Mike Anzick – Senior Advisor, ORDES/OES
Patrice McLean – Deputy Director, ORDES/OES
Dr. Paul O’Leary – Economist/Senior Researcher
Emily Roessel – Researcher
Ann Robert – ARCMOS, DCO

Federal Partners

Dr. Michael Marge – Task Force Executive Director, Department of Health and Human Services
Dr. Corinna Stiles – Administration for Community Living, Department of Health and Human Services
Kirk A. Lew – Senior Advisor, Office of Disability Employment Policy, Department of Labor
Jerry Elliott – Policy Team Supervisor, Rehabilitation Services Administration, Department of Education

Employment Networks

Lisa Brown Jordan – Human Solutions
Pam Walker – Alliance Professional Services
Susan Webb – Ability 360
Amy Wallish – Full Circle
MJ Willard – National Telecommuting Institute
Judy Sanderson – Granite State Independent Living
Matthew Silverstein – America Works
Melanie R. Magill – CareerSource Broward
Rachel Hoffman – The Choice Group
Rich Plass – Allsup
Frank Chisolm – EmployReward Solutions
Crista E. Nivens – EmployReward Solutions
Thomas (Tad) Asbury – Marriott Foundation for People with Disabilities
Becky Hornor – Mission Possible Employment Services

Vocational Rehabilitation

Cheryl Vail – New Jersey Vocational Rehabilitation Services
David Leon – Virginia Department for Aging and Rehabilitative Services
Eric Schmidt – Maryland State Department of Education, Division of Rehabilitative Services
Jessica Hawes – Maryland State Department of Education, Division of Rehabilitative Services
Andy Johnson – Wisconsin Division of Vocational Rehabilitation
James Smith – Vermont Division of Vocational Rehabilitation
Noreen Rocea – Utah State Vocational Rehabilitation
HarrietAnn Litwin – Delaware Division of Vocational Rehabilitation

Other Stakeholders

Felix Stump – Senior Project Director, Ticket Program Manager, MAXIMUS Federal Services
Ana Morales – EN Development Manager, Ticket Program Manager, MAXIMUS Federal Services
Jenni Purdum – Program Integrity Manager, Ticket Program Manager, MAXIMUS Federal Services
Michael Greenberg – Senior Specialist, Ticket Program Manager, MAXIMUS Federal Services
John Kregel – Research Director, Rehabilitation Research and Training Center, Virginia Commonwealth University
John Connelly – Director of Research and Grants, Council of State Administrators of Vocational Rehabilitation
Cheryl Bates-Harris – Senior Disability Advocacy Specialist, Training and Advocacy Support Center, National Disability Rights Network

AGENDA

Achieving Successful Employment Outcomes for SSDI and SSI Beneficiaries:

Transforming Ideas into Action Plans

JUNE 12-13, 2019

1700 A/B ROBERT M. BALL BUILDING

PURPOSE: To engage employment experts in a discussion of the effective strategies that support successful employment programs and outcomes for adult Social Security beneficiaries with disabilities.

DAY 1

9:00 a.m. – 9:15 a.m.

INTRODUCTION

Dr. Mark J. Warshawsky

Deputy Commissioner for Retirement and Disability Policy, SSA

Dr. Katherine N. Bent

Associate Commissioner, Office of Research, Demonstration, and Employment Support (ORDES), SSA

THEME I:

UNDERSTANDING RESEARCH ON IDENTIFYING THE TARGETED POPULATION

9:15 a.m. – 10:45 a.m.

CHARACTERISTICS OF BENEFICIARIES WHO RETURN TO WORK

Facilitator

Dr. Michael Marge

U.S. Dept. of Health & Human Services (HHS)

Presenters/Topics

Emily Roessel and Dr. Paul O’Leary

SSA

Presentation of SSA’s research on the characteristics of working beneficiaries.

John Kregel

Virginia Commonwealth University (VCU)

Presentation of data on the population served by the Work Incentives Planning and Assistance (WIPA) programs.

Discussion Questions

- Of the 13 million eligible beneficiaries, what is the potential population that is work ready?
- What do our program data reveal about how long beneficiaries work, show earnings, and ultimately achieve self-sufficiency?
- What are the characteristics of beneficiaries receiving services from the WIPA programs?

10:45 a.m. – 11:00 a.m.

B R E A K

THEME II:

INCREASING TICKETHOLDER PARTICIPATION

11:00 a.m. – 12:15 p.m.

PANEL: Increasing Outreach and Lessons Learned

Facilitator

Felix Stump

MAXIMUS

PANEL MEMBERSEmployment Networks (EN)

Rich Plass

Allsup

Frank Chisholm

EmployReward Solutions

Lisa Jordan

*Human Solutions*Vocational Rehabilitation (VR Service Providers)

David Leon

*Virginia Dept. for Aging and Rehabilitative Services***Discussion Questions**

- How do the characteristics of beneficiaries that ENs and VRs target match SSA's research?
- What outreach methods for beneficiary participation are most successful?
- How can SSA further support these successful outreach methods to achieve greater program participation?
- Open discussion (audience may ask questions and share experiences)

12:15 p.m. – 1:15 p.m. **L U N C H B R E A K: Participants Purchase Food and Eat at SSA HQ Cafeteria**

1:15 p.m. – 1:35 p.m. **REFLECTIONS FROM THE FIELD**

Ann Robert

*Assistant Regional Commissioner for Management and Operation Support, SSA Chicago Region*Topic

Ms. Robert will provide a high-level update on relevant Operations activities and answer questions.

1:35 p.m. – 1:55 p.m. **DISCUSSION ON MULTI-AGENCY TASK FORCE ON EMPLOYMENT OF PEOPLE WITH DISABILITIES**

Dr. Michael Marge

Coordinator, Multi-Agency Task Force on Increasing Employment Opportunities for People with Disabilities, HHS

Dr. Marge will discuss the goals of the Task Force and its activities to increase employment for individuals with disabilities.

1:55 p.m. – 3:15 p.m. **ROUNDTABLE: How to Close the Deal - Convincing the Ticketholder to Assign the Ticket**

Facilitator

Felix Stump

*MAXIMUS***Discussion Questions**

- What methods are most effective in achieving program participation?
- How does your organization use part-time work to encourage or discourage program participation?
- What are the barriers or myths to participation in employment support programs?
- What tools does your organization use to overcome these barriers or myths?

3:15 p.m. – 3:25 p.m. **B R E A K**

THEME III: ESSENTIALS FOR SUCCESSFUL JOB PLACEMENT AND RETENTION

3:25 p.m. – 4:45 p.m. **PANEL: Services and Supports Resulting in Job Placement and Retention**

Facilitator

Kirk Lew

U.S. Dept. of Labor (DOL), Office of Disability Employment Policy

PANEL MEMBERS

Representing ENs

Pam Walker

Alliance Professionals

Representing VRs

Eric Schmidt

Maryland Division of Rehabilitation Services

Amy Wallish

Full Circle

Rachel Hoffman

The Choice Group

Discussion Questions

- What skills, trainings, supports, and/or services are most successful in achieving successful job placement?
- What are the barriers to employment that service providers help beneficiaries overcome?
- What tools are required to overcome these barriers?
- What services and supports are most effective for getting your clients a job and keeping them employed?
- What partnerships or relationships does your organization have with employers that result in successful job placement?
- What role can SSA play in strengthening these partnerships and in otherwise linking jobs and employers to the Ticket program?

4:45 p.m. – 4:50 p.m. **CLOSING/LOGISTICS FOR THE EVENING**

Robert Pfaff

Director of the Office of Employment Support, SSA, ORDES

6:30 p.m. **RECEPTION/GATHERING**

Crowne Plaza – Inner Harbor, Baltimore

105 West Fayette Street, Baltimore, MD 21201 Hotel Lobby/Reception Area

DAY 2

9:00 a.m. – 9:15 a.m.

INTRODUCTION

Stephen Evangelista

Assistant Deputy Commissioner for Retirement and Disability Policy, SSA

THEME IV:

EFFECTIVE STRATEGIES FOR HELPING WORKING TICKETHOLDERS

9:15 a.m. – 10:45 a.m.

ACHIEVE SELF- SUFFICIENCY

Facilitator

Michael Greenberg

MAXIMUS

PANEL MEMBERS

Representing ENs

Matthew Silverstein

AmericaWorks

Representing VRs

Andrew Johnson

Wisconsin Department of Workforce Development

Discussion Questions

- What are the characteristics or attributes of clients who return to work and achieve self-sufficiency?
- What supports and services are most effective in helping beneficiaries achieve self-sufficiency?

10:45 a.m. – 11:00 a.m.

B R E A K

THEME V:

MEASURING SUCCESSFUL EMPLOYMENT OUTCOMES

11:00 a.m. – 12:15 p.m.

PANEL: Measuring Success: Comparing How SSA Measures Success to How Providers

Measure Success

Facilitator

Michael Anzick

SSA, ORDES

Speaker/Topic

Robert Pfaff

Director of the Office of Employment Support, SSA, ORDES

Mr. Pfaff will explain how SSA defines successful employment outcomes for ticketholders.

PANEL MEMBERS

Representing ENs

Melanie Magill

CareerSource Broward

Representing VRs

Noreen Roeca

Utah State Office of Rehabilitation

Becky Horner

Mission Possible

Discussion Questions

- How does your organization collect data and measure success?
- How do these measures align with SSA's programmatic measures?
- What can SSA learn from external data to inform its return to work programs?

12:15 p.m. – 1:15 p.m. **L U N C H B R E A K: P**articipants Purchase Food and Eat at SSA HQ Cafeteria

1:15 p.m. – 2:15 p.m. **FEDERAL PARTNERS DISCUSS ENGAGEMENT WITH SSA**

PART 1 – DOL and SSA's Collaboration to Engage Workforce in the Ticket to Work Program

Kirk Lew

DOL, Office of Disability Employment Policy

Mr. Lew will discuss DOL and SSA's collaborative efforts to increase the number of DOL workforce agencies that serve as ENs and the potential associated benefits of doing so.

PART 2 – Discussion of the Opportunity for Centers for Independent Living (CIL) to Engage in the Ticket to Work Program

Corinna Stiles,

Director, Office of Independent Living, Administration for Community Living, HHS

Dr. Stiles will discuss efforts between HHS and SSA to recruit CILs to become ENs and also how Ticket to Work revenue can strengthen the CIL program.

2:15 p.m. – 2:30 p.m. **B R E A K**

2:30 p.m. – 4:15 p.m. **THEMATIC SYNTHESIS AND ACTION PLANS**

Facilitator

Felix Stump

MAXIMUS

PART 1 – Participants will divide into groups focused on one of the following themes/actions plans.

1. Increasing Program Participation
2. Improving Supports and Services
3. Increasing Employment Entry
4. Increasing Employment Retention
5. Increasing Transition into Self-Sufficiency

Part 2 – The groups will reconvene for a discussion of all themes and action plans.

4:15 p.m. – 4:30 p.m. **CLOSING REMARKS**

Dr. Mark J. Warshawsky

Deputy Commissioner for Retirement and Disability Policy, SSA