

Module 2

Partnering with Community Agencies and Conducting Community Outreach

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Module 2

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INTRODUCTION

Promoting employment outcomes for beneficiaries of SSA disability programs is not something that Community Work Incentives Coordinators (CWICs) can accomplish in isolation. Work Incentives Planning and Assistance (WIPA) services are only one small piece of the employment puzzle; they must be combined with vocational counseling, job search assistance, job accommodations and numerous other employment-focused services and supports if significant gains are to be made.

Content in this area will begin by focusing on providing effective outreach and will include activities which target both Ticket-eligible Social Security Administration (SSA) beneficiaries and other SSA beneficiaries with disabilities in the geographic area, as well as outreach activities designed for community agencies, stakeholder groups, and partner agencies. Content will also focus on working collaboratively with other public and private community-based organizations such as SSA Field Offices, DOL One-Stop Career Centers, Vocational Rehabilitation (VR) Agencies, Employment Networks (ENs), public schools, mental health organizations, and IDA/Asset Building organizations.

CWIC CORE COMPETENCIES ADDRESSED

1. Develops and implements outreach strategies designed specifically to increase WIPA service delivery to traditionally underserved populations (e.g., transition age youth with disabilities, veterans with disabilities, Native Americans, etc.).
2. Collaborates with other public and private community-based organizations (e.g., state VR agencies, DOL One-Stop Career Centers) through interagency agreements or other information or resource sharing mechanisms to support employment outcomes for beneficiaries.
3. Collaborates with agencies / organizations in the asset building community (AFIA grantees, state IDAs, etc.) to promote the successful participation of beneficiaries in Individual Development Account and financial literacy programs.
4. Describes strategies to promote WIPA capacity building and enhance the availability of employment focused work incentives counseling services to SSA disability beneficiaries through collaboration with other local and state entities.



Competency Unit 1

Performing Outreach to SSA Beneficiaries with Disabilities, Community Agencies, and Other Key Stakeholders

THE IMPORTANCE OF OUTREACH

Since work incentives counseling services are a relatively new phenomenon within the disability services array, many SSA beneficiaries and disability professionals are simply not aware that they exist. To get the word out, CWICs will need to do more than simply hang up a sign announcing the arrival of WIPA services. Outreach activities are needed to introduce these services to potential “customers,” which in this case refers to beneficiaries of the SSA disability programs and the agencies most likely to refer eligible beneficiaries. The WIPA outreach process is primarily a marketing or sales function and the outreach activities CWICs perform have much in common with what salespeople in the business world do. The objective of this specialized marketing effort is three-fold:

1. Outreach is intended to raise awareness of WIPA services within the disability community and educate both beneficiaries and agency personnel about what these services include and who they are intended to assist.
2. Outreach efforts are intended to promote employment of people with disabilities by educating beneficiaries as well as agency personnel on the facts about how earned income affects public benefits and how work incentives may be used to help achieve occupational goals.
3. Outreach activities help CWICs establish relationships with other agency personnel who are also engaged in supporting individuals with disabilities in their efforts to access paid employment. These disability professionals can serve as helpful partners with the WIPA projects in the overall mission to increase employment outcomes for persons with disabilities.

To begin marketing WIPA services, CWICs need to find ways to reach the targeted customer base – SSA beneficiaries with disabilities age 14 up to full retirement age who are interested in employment. Perhaps the most efficient and effective way to reach eligible beneficiaries is to contact the agencies that serve them – particularly agencies that provide vocational or employment services. CWICs make contact with these agencies using a variety of sales or marketing techniques. We will discuss these techniques in more detail later in this unit. The primary purpose of these marketing activities is to solicit refer-

rals from the partnering agencies in the local community. The goal in this case is to persuade community agencies to refer their clients to the WIPA project and to encourage eligible beneficiaries to utilize work incentives planning services in their efforts to enter the work force.

Outreach activities also include educating beneficiaries and community agencies about the effect of employment on the various public benefit programs. Education is critical because so much misinformation and misunderstanding surrounds this issue. Unfortunately, much of this misinformation is spread within the disability services community by well intentioned, but uninformed agency personnel. The purpose of WIPA outreach to disability services agencies is to increase community awareness of the many work incentives available to beneficiaries. The message of this educational effort is that employment and public benefits are not necessarily mutually exclusive. It is quite possible for SSA beneficiaries with disabilities to work and retain cash payments as well as medical benefits. It is also possible to work and have an overall better financial outcome than by remaining dependent on public benefits. Increasing awareness of the Social Security work incentives is intended to ease the fear and uncertainty over employment felt by many beneficiaries and the professionals who serve them. Knowledge of Social Security work incentives truly is power in this instance.

Finally, outreach is necessary to establish networks with key community stakeholders. WIPA services will not be successful if provided in a vacuum. There are many other players that need to buy in to the process of work incentives planning for real change to occur. These stakeholder groups are identified and described in Unit 3 of Module 1, but they include:

- ▶ State Vocational Rehabilitation Agencies
- ▶ Employment Networks under the Ticket-to-Work program
- ▶ State or regional Workforce Investment Boards, One-Stop Centers and the Disability Program Navigator (DPN) Initiative
- ▶ State/local Mental Retardation/Developmental Disability agencies
- ▶ State/local Mental Health/Chemical Dependency/ Substance Abuse agencies
- ▶ Centers for Independent Living
- ▶ State Protection & Advocacy agencies
- ▶ Public school systems
- ▶ Individual Development Account (IDA) Programs
- ▶ US Department of Veterans Affairs

Under the WIPA initiative, it is important to understand that outreach activity must be a two-way street in which reciprocal relationships are built. It is not just about having stakeholders know what WIPA services entail and what CWICs do. It is equally important that CWICs get to know the key players and understand their roles. CWICs rely upon the assistance of these stakeholder groups in a variety of ways as they work with beneficiaries to promote employment and enhance self-sufficiency. The more WIPA personnel interact and collaborate with other community stakeholders, the more successful the local project and the national WIPA initiative will be. For more information about how to work collaboratively with these stakeholder groups, go to Unit 3 of this module.

OUTREACH CONSIDERATIONS

Since outreach is such an important activity, CWICs need to plan carefully in order to achieve the desired results in an efficient and effective manner. Before reviewing specific strategies, we need to introduce the WIPA outreach function in general terms. Several important considerations need to be addressed before a CWIC starts outreach activities.

Outreach as an

Ongoing Activity----- First, keep in mind that outreach is an ongoing activity that never ends. Outreach is not something that is only performed when the WIPA project is in start-up mode. The target population for WIPA services is fluid with new “customers” continually coming onto the disability rolls in need of services. In addition, community-based service agencies often have high rates of staff turnover. CWICs will need to regularly repeat awareness activities to train new SSA beneficiaries and new staff. In addition, current beneficiaries and

existing staff will also need “booster shots” of information to keep the new service in the forefront. Busy disability services workers sometimes forget about all the valuable community resources at their disposal, and WIPA services are no exception. CWICs learn quickly that they need to frequently contact community agencies when it comes to maintaining awareness of their services.

Budgeting Staff Time to Perform Outreach

----- WIPA projects need to consider the staff time required to perform outreach as well as staff ability to handle the increased demand which this marketing creates. If too much outreach is done, there may not be enough time or personnel to serve beneficiaries. Drumming up customer demand in excess of program capacity to deliver services is NOT a desirable outcome. Project Managers must achieve a workable balance between marketing activity and actually delivering services. CWICs also must remember that under the WIPA initiative, SSA has actually limited outreach activity to 10% of total staff time. This limit has been imposed for two reasons. First, SSA desires to have CWICs focusing more of their time utilizing their valuable expertise to provide individual work incentives planning and assistance services. Second, SSA has enlisted the services of a Beneficiary Access and Support Service (BASS) to assume some of the outreach activity under the WIPA program. The role of the PMRO has been explained in detail in Unit 1 of this module and information is provided there about how SSA expects WIPA projects to coordinate their outreach efforts with the PMRO.

WIPA Project Managers must also consider how staff resources will be deployed to conduct outreach activity. Will all staff members share in this responsibility, or only designated staff? There are advantages and disadvantages to both strategies that will need to be considered and constantly reappraised. Some CWICs may be particularly skilled at the marketing aspects of outreach and may perform this function more effectively and enjoy it more than others. In other cases, a CWIC may be so technically skilled at work incentives advisement that it would not make sense to have this person perform outreach when beneficiaries are waiting to be served. WIPA programs need to pay close attention to the allocation of staff resources to achieve the best overall results. Again, it is important to keep in mind that WIPA projects are limited to allocating no more than 10% of their staff resources to outreach activity beyond time spent in collaborative outreach with the PMRO.

Developing and Following an Outreach Plan

----- The outreach function can feel a little overwhelming to CWICs – especially if they have not done it previously. The key to being successful is staying organized and planning carefully in advance. The best way to begin is by determining a general approach to outreach. WIPA projects are encouraged to develop a written outreach plan listing the agencies prioritized for outreach activity and describing the methods to be used in marketing WIPA services. If outreach efforts will directly target SSA beneficiaries, the method for conducting this activity also needs to be clearly described. Many WIPA projects developed an outreach plan as part of their initial project proposal. It is advisable for all CWICs to check with their Project Manager to see if an outreach plan exists before they embark upon this activity. If an outreach plan does not already exist, it is highly recommended that the WIPA project work to develop one.

“Staying On-Message” ----- In any successful marketing campaign, one of the most essential tasks is to communicate a clear and consistent message to the “customer.” This process is commonly referred to in popular parlance as “staying on-message.” While staying on-message may be simple when selling a product like toothpaste, it becomes rather challenging when marketing a complex service such as WIPA. Even more challenging is selling the notion that employment and disability benefits are NOT mutually exclusive when beneficiaries have spent months or years proving to SSA that they are incapable of

working at a substantial level in order to initially qualify for these benefits. In order to avoid misunderstandings, CWICs must clearly state their message. The following points are what WIPA projects are trying to convey whenever outreach or marketing activities are conducted:

1. Paid employment and SSA disability benefits are NOT mutually exclusive – beneficiaries do not have to choose between work and benefits.
2. It is possible to work (even full-time) and keep Medicaid and/or Medicare in almost every case.
3. It is possible to work and come out ahead financially even if public benefits are reduced or even ceased.
4. It is possible to get disability benefits back again if they are lost due to employment.
5. The WIPA initiative is NOT intended to force people off benefits, nor is it intended to help people maximize their benefits.

If CWICs can stay focused on these points and constantly reinforce them at every opportunity, a great deal of misinformation can be corrected. These points must be repeated and reiterated at every outreach event and at every interaction with beneficiaries, family members and community agency personnel in order for people to really “hear” the message and accept it as being fact. Communicating this message is a never-ending process and is one of the most basic services WIPA projects provide to their local communities.

The “Anti-Message” --

a Warning to CWICs! ----- There is one message above all others that CWICs must be vigilant to avoid communicating. In the world of WIPA, we refer to this as the “Anti-Message.” The intent of WIPA services is NOT to keep individuals on disability benefits indefinitely. CWICs should not act as if their job is to “save” beneficiaries from benefit cessation or termination due to employment at all costs. This means that CWICs must not behave in ways that cause beneficiaries to unnecessarily fear working above SGA, earning wages over the SSI break-even point, or earning more than the 1619(b) threshold amount. Similarly, CWICs should not be routinely encouraging all beneficiaries to suppress their wages or net earnings from self-employment (NESE) in order to retain benefit eligibility. Finally, CWICs must not feel it is their heroic duty to find some way – any way – to reduce countable earnings to evade cessation or termination.

While it may not be in the best interests of some individuals to fully terminate from benefits due to work, this is certainly NOT the case for all beneficiaries, or even most beneficiaries. Terminating from benefits is not a universally “bad” thing and is not harmful in the majority of cases. CWICs must be careful that they are not presenting this outcome in a universally negative fashion when counseling beneficiaries. In fact, individuals with the capacity to generate earnings sufficient to cause termination may be better off financially by doing so – as long as all costs of employment are considered and health care needs continue to be met. As in all things, the goal is to work with each beneficiary individually to determine what that person’s goals are and support that individual to achieve the highest earnings potential possible within the framework of those goals. Counseling techniques or messages which discourage beneficiaries from working or frighten them into retaining attachment to public benefits is contrary to everything WIPA services are trying to achieve.

Once a WIPA Project Manager has determined who will do outreach and when outreach will be conducted, it is time to focus on how the outreach activity will be performed. Which outreach strategies or techniques are most effective for the local stakeholder groups? The best approach is to use a combination of techniques to maximize the chances of reaching the various stakeholder groups or customer populations. Remember, the objective is to get the word out about WIPA services to as many people as possible – this includes SSA beneficiaries as well as professionals who provide services to this group. In this case, there needs to be a broad dissemination of information across the community. A brief description of the most common marketing and public awareness activities that WIPAs engage in is provided below. This is by no means an exhaustive list. Local WIPA projects know their communities best and will be able to devise many creative ways to market WIPA services.

Outreach Activities

Directly Targeting SSA

Beneficiaries with

Disabilities

----- Although there is no ultimate all-encompassing mailing list of WIPA eligible beneficiaries, there are still ways to make direct contact with groups of beneficiaries using more circuitous methods. One way is to make arrangements with local agencies that have extensive mailing lists to send out mass mailings of fliers announcing WIPA services. Generally, the WIPA project would reimburse agencies for producing mailings of this type, but some agencies will do them for free as a service to their clients. Agencies serving individuals with disabilities are prohibited by law from sharing contact information on their clients with any other entity.

When trying to reach beneficiaries who may still be in school, it is possible to get assistance from public school systems in some cases. If WIPA projects can provide fliers to special education teachers, school counselors or family resource centers, those fliers can be sent home to parents via the students. In some cases, schools may even mail the fliers out to students and their families. WIPA projects could announce not only their services, but also invite students and families to attend an informational session about SSA benefits and employment. It is recommended that this process be repeated every year to catch new students entering the system and to provide reinforcement to students or families who have attended informational sessions in past years. Performing outreach activity for transition-age youth can be particularly challenging since many of these individuals are not connected with the disability services community. For an excellent discussion of outreach activities designed specifically for transition-aged youth, refer to a Policy & Practice Brief produced by Cornell University, School of Industrial and Labor Relations, Employment and Disability Institute entitled, "Conducting Outreach to Transition-Aged Youth: Strategies for Reaching Out to Youth with Disabilities, Their Families, and Agencies that Serve Them." This paper is available online at: http://www.ilr.cornell.edu/edi/publications/PPBriefs/PP_25.pdf.

Finally, WIPA projects may reach beneficiaries directly by using traditional mass marketing techniques such as television or radio advertisements or even public service announcements (PSAs). With the exception of PSAs, these techniques tend to be rather expensive and many WIPA projects will not have sufficient funds to conduct them. WIPA projects also need to remember that any advertisement of this sort would need to be approved in advance by SSA OESP.

Marketing Presentations to Community Agencies and Groups

----- It is not enough to send letters of introduction to all the stakeholder agencies and then sit back and wait for the referrals to arrive. CWICs need to explain face-to-face what

the WIPA services are and how they can help beneficiaries achieve their career goals. An essential component of any WIPA outreach plan is marketing presentations provided to stakeholder groups and community agencies. Understand that these meetings are not cold calls nor impromptu visits. In order to include the largest audience possible, these meetings are carefully arranged in advance with agency management staff. In some cases, the audience will only include professionals, but in other cases, the audience may include beneficiaries, family members, caregivers as well as service providers. WIPA projects should seek to attract the largest and most diverse group possible. Keep in mind that meetings need to be held at various times to accommodate different schedules. If presentations are only offered during standard work hours, many family members will be unable to attend. It is best to hold some meetings in the evenings or even on weekends to attract the most people possible.

In these outreach meetings, the focus is on general awareness of WIPA services. Key information to provide includes the following:

- ▶ Description of services provided and any limitations on these services;
- ▶ Identification of the main objective of WIPA services;
- ▶ Description of who is eligible for services and which beneficiaries are considered a high priority for services; and
- ▶ Instructions on how to make referrals for WIPA services.

It is critical that CWICs are clear about who is NOT eligible for WIPA services (such as people in application status or those needing assistance with appeals) to insure that appropriate referrals are made. It is important not to assume that the audience knows who to refer or who would benefit from WIPA services. Providing a written list of eligibility criteria and indicators of ineligibility is essential to avoid misunderstandings.

In addition, CWICs must be clear about the goal of WIPA services. Referral sources often mistakenly think that the purpose of the WIPA program is either to get people OFF disability benefits or to maximize public benefit payments. Neither of these perceptions is correct! In fact, the objective of the WIPA program is to provide work incentives planning and assistance services in order to promote employment and enhance self-sufficiency for beneficiaries of the SSA disability programs. Putting this objective in writing is important in clearly identifying the goal of WIPA and avoiding any misperceptions.

When describing WIPA services, it is also helpful to give examples of what types of assistance WIPA projects do NOT provide. Community agencies frequently think that WIPA projects provide representative payeeship services or actively manage benefits and report beneficiary income to Social Security. If referral sources have unrealistic expectations about what the WIPA project does, they will make inappropriate referrals or be disappointed in the services offered. CWICs can manage these expectations by providing clear written information about their role during outreach meetings. A useful handout entitled "Tips for Identifying a WIPA Services Candidate" is provided at the end of this unit to use when teaching referral sources who to refer for WIPA services.

A note about the difference in the former Benefits Planning, Assistance and Outreach Program (BPAO) and the WIPA Program:

When conducting outreach under the WIPA program, CWICs need to be sensitive to the fact that community agencies may be confused about how WIPA services differ from services provided under the former BPAO program. It is essential that CWICs clarify this difference to ensure appropriate referrals and to manage the expectations of key stakeholders.

The clear purpose of the WIPA program is to provide the specific services and supports that will directly assist SSA beneficiaries with disabilities to succeed in their return to work efforts. While the BPAO program had a significant focus on work and employment support, many individuals served through these programs did not have plans to obtain or increase their level of employment. While the BPAO program was viewed by many as highly successful and undoubtedly helped thousands of individuals to pursue realistic employment opportunities, the ultimate impact of the program was diluted by the fact that Benefits Specialists provided significant amounts of service to beneficiaries who had no interest in obtaining employment at any time in the near future. In addition, Benefits Specialists in the former BPAO program often only assisted beneficiaries with non-work related issues.

Under the WIPA program, services are strictly focused on employment and work incentives. When providing outreach activities, CWICs must be clear about the focus of the new WIPA initiative and must provide specific examples of the types of services that are beyond the scope of this program. In addition, CWICs must help disability services organizations understand the type of beneficiary who is targeted by the WIPA program and for whom its services are intended. Again, specific examples are helpful when teaching potential referral sources who would and would NOT be a priority referral.

Dissemination of Marketing Materials

----- Dissemination of marketing materials is another common technique WIPA projects use to spread the word about benefits counseling services. Marketing materials may include brochures, fliers, posters, or other printed materials. Dissemination methods may include mass mailings, leaving brochures at Social Security or VR office waiting rooms, or displaying posters where beneficiaries are most likely to see them. Many WIPA projects have found that displaying posters prominently at the local Social Security office or in the waiting rooms of the local Medicaid or welfare agencies are particularly effective methods of marketing WIPA services. The objective is to be creative and think about the dissemination points that will bring marketing materials to the attention of the most eligible people.

Keep in mind that any written materials a WIPA project uses in outreach activity must be approved by SSA prior to its dissemination. Contact your SSA OESP Project Officer for more information about how to get marketing materials approved.

Participation in Resource Fairs

----- Another useful strategy is to staff a booth or table at local resource fairs, conferences, or other large gatherings of stakeholder groups. These events may include state rehabilitation association meetings, conferences for special education teachers, or advocacy group meetings. CWICs can reach a significant number of people in a relatively short time by attending these events. Even more effective is to get the WIPA project on the agenda to make a public awareness presentation. It is important to staff these events with trained CWICs because beneficiaries commonly ask questions about their own situations. WIPA personnel must be ready to provide information about the impact of work on benefits to individuals attending these events and should have plenty of SSA Redbooks to hand out as well.

Informational Seminars on Social Security Benefits and Work Incentives

----- Finally, WIPA projects may generate referrals from disability services organizations by providing information sessions on the Social Security disability benefits and associated work incentives. These are not just public awareness events, but are intended to

increase understanding of how the disability benefits are affected by paid employment. CWICs need to be careful using this approach as it can be very time consuming. It requires skilled staff to conduct informational sessions of this type, and not all CWICs will feel comfortable with this activity. Presenting on the work incentives in front of an audience is very different from providing one-on-one benefits counseling. Informational seminars are advantageous since training stakeholders on the basic effects of employment on benefits spreads important knowledge. Having agency staff feel more positively about employment can have positive ripple effects with beneficiaries. Keep in mind that the goal of these informational sessions is to establish a basic understanding of the work incentives and not intended as intensive training. Remember, all materials to be used in such training must be approved by the Social Security Administration in advance. WIPA personnel who wish to review recommended examples of work incentives seminars are encouraged to contact their WIPA NTC Technical Assistance Liaison. There are numerous excellent examples of work incentive presentations designed for various audiences, which can be shared to save development time.

MARKETING PRESENTATIONS

Before getting in front of stakeholders to market WIPA services, it is important that CWICs are prepared to answer the single most important question the audience will have. That question is, “what’s in it for me?” CWICs who are unable to answer this question satisfactorily will not be able to “sell” the service. If the targeted audience does not recognize the value of the service and how it will be of benefit on a personal level, the WIPA project will get neither referrals nor customers. People do not buy things they do not want or do not think they need -- it is just that simple.

An effective marketing presentation answers these four basic questions:

- ▶ What are the tangible benefits of WIPA services?
- ▶ What problems will WIPA services solve?
- ▶ How will potential future problems be avoided?
- ▶ What are the unique “features” of WIPA services?

The answers to these questions will vary depending on the stakeholder group. Never assume that what one group perceives as a benefit or positive feature of WIPA services will be of equal value to another group. Each customer group will value different aspects of the program. It is the CWIC’s job to assess the interests of the various stakeholders and to customize the sales pitch to address these interests.

When making a WIPA marketing presentation, there is no need to be coy about the benefits of the service and what problems it will solve. Consider making a list of the important benefits and features to use as a handout which can be included in marketing brochures or shown in presentation slides. Remember to modify the lists to meet the needs and interests of the various stakeholder groups. Making a list of WIPA benefits and features is a good idea because it helps WIPA personnel think about the interests of the audience in advance. The more CWICs know about the audience and the more prepared they are to address specific interests or concerns, the more effective the presentation will be for audience members. Speaking extemporaneously is never recommended – preparation and practice are the keys to success!

Another tip is to be clear about the purpose of the presentation and to stay on-message. Tell the audience what to expect in advance and then continue with the prepared presentation outline. Marketing talks are intended to help the audience understand what WIPA services include, who they serve, and what benefits they offer. This is neither the time nor place to be training the audience on the details of the Social Security work incentives or other federal transfer programs. Marketing and training are very different processes and WIPA personnel must never get these functions confused. This is also not the time to get into benefits counseling for specific individuals, even if members of the audience ask case-specific questions. If questions about specific cases arise, ask to meet with the individual after the presentation for a private discussion. Trying to address case-specific issues in front of a group usually ends up confusing the audience. Staying focused is important – do not let audience members get the presentation off-track!

It is also recommended that CWICs keep marketing presentations to no more than 45 minutes to an hour. CWICs should not need more time than this to achieve the desired goals, particularly if the presenter arrives prepared and stays on-message. It is also essential that the presentation be accompanied by written materials to reinforce what is said such as a program brochure or fact sheet. Keep the printed materials brief and user-friendly. No one wants to read a lengthy treatise on work incentives or wade through an agency's annual report. Make sure brochures provide correct contact information and give instruction about how customers should access services.

If possible, partner with other players when doing outreach or marketing presentations. Joint presentations conducted by WIPA and Protection & Advocacy for Beneficiaries of Social Security (PABSS) personnel are often a good idea. If more than one WIPA project exists in the state, seek opportunities for CWICs from different agencies to work together on marketing functions. Finally, look for ways to collaborate with Social Security personnel on marketing activities. Most large SSA offices have Public Affairs Specialists, Work Incentives Liaisons (WILs) or other staff who perform community awareness functions. Teaming up on marketing presentations is a great way to build relationships and to demonstrate the partnership between Social Security and WIPA projects.

MANAGING CUSTOMER EXPECTATIONS

An important aspect of successful marketing in the business world is managing the expectations of customers. Many of us have experienced being sold a product after a salesperson has made many grandiose promises only to be disappointed with reality after the product has been purchased. That is something WIPA projects must avoid at all costs when marketing and delivering services. It is always better to "under sell" our services and then exceed customer expectations when services are provided. This is how satisfied customers are created.

Under Selling = Developing Realistic Expectations

----- The phrase "under selling" means helping customers achieve realistic and reasonable expectations of the benefits and outcomes of WIPA services. It is essential that CWICs and WIPA Project Managers not make promises that they cannot keep. Examples of this would include telling beneficiaries that WIPA services will insure that overpayments will not occur. Even when all relevant information is reported correctly and in a timely manner, mistakes may continue to be made which may cause overpayments. CWICs cannot control the internal workings of the Social Security Administration. Another example would be to promise beneficiaries or service providers that the CWIC will personally handle all work incentives issues such as claiming Impairment Related Work Expenses (IRWEs) or writing Plans for Achieving Self Support (PASS). This is bad practice on several counts. First, CWICs will not have time to fulfill commitments like this, nor would they want to foster this level of dependency with beneficiaries. Recipients of WIPA services are expected to be active participants in the process and need to understand that they will have an active role to play in developing and managing work incentives. Similarly, CWICs may need to help Social Security personnel understand what they can reasonably expect from WIPA services. CWICs are not responsible for reporting wage information for beneficiaries, nor do they function as representative payees in managing benefits. CWICs must have a crystal clear understanding of what their role is and is not. CWICs must also clearly and consistently communicate this information to all stakeholder groups.

Over Delivering = Exceeding Customer Expectations

----- WIPA projects that are successful in managing the expectations of beneficiaries and referral sources will be much more likely to meet or exceed these expectations in the provision of WIPA services. For a CWIC, meeting expectations means providing clear, correct and complete benefits information that helps beneficiaries achieve their employment goal and enhances self-sufficiency. At a minimum, the CWIC's job is to answer benefits questions, lay out available options and provide specific information

about the pros and cons of the various courses of action. The ultimate goal, however, is to “over deliver” services – this means that services go beyond what the customer expects. This does not mean that a CWIC does everything FOR the customer. Exceeding expectations means being creative and going beyond merely answering the questions posed by beneficiaries. It means applying work incentives expertise to maximize the positive outcomes from employment.

**Establishing Trust =
Delivering Quality WIPA
Services** -----

Finally, to be successful over time, CWICs must establish trust by consistently delivering high quality services. Remember that word of mouth is a powerful marketing tool that can work to one’s advantage or disadvantage. Beneficiaries and agency personnel will talk to one another about their experiences with various WIPA projects. A dissatisfied beneficiary or two can severely damage the project’s reputation and these effects can be felt for long periods of time. Slick marketing presentations will never make up for shoddy service delivery. Keep in mind that the beneficiary is only one of the “customers” CWICs need to pay attention to. Referral sources and the other key stakeholder groups must also be well served in order to protect the reputation of the WIPA project. Successful CWICs treat every interaction with a beneficiary or stakeholder as a valuable marketing opportunity.

EVALUATING OUTREACH AND MARKETING EFFORTS

WIPA projects that are interested in knowing which outreach activities are most effective in terms of soliciting referrals will need to keep track of them. Social Security also requires that WIPA projects report the number and type of outreach activities performed each month as well as an estimate of the number of participants. WIPA projects that keep good outreach data and review it from time to time will learn a great deal about which activities work and which do not in terms of soliciting referrals.

**Keeping Track of
Outreach Activities** -----

A good place to start in outreach record keeping is maintaining a chronological list including: marketing presentations made, presenters’ names, and attendees. WIPA personnel can develop a list of attendees by simply passing around a sign in sheet with space for contact information. If there are sufficient time and staff resources, developing a database or mailing list also is helpful. These can be used to prepare mass mailings of brochures, newsletters, or other materials to keep stakeholders updated about WIPA services. In addition, CWICs should also collect data on how customers heard of the program or who referred them and continue to keep track of this data.

**Tracking Referral
Sources and Checking
Penetration of
Populations** -----

WIPA Project Managers may want to gather more specific information about outreach activity than is normally required by SSA in order to determine which stakeholder groups generate the most referrals. It is a simple process to ask customers who referred them during the initial call and to keep track of this information. Another reason for collecting information about referral sources is to determine which referral sources misunderstand the objective of the WIPA program. Agencies that repeatedly refer ineligible individuals for WIPA services need more education. Only by tracking referral sources will WIPA managers know which agencies need to be targeted for another outreach or education session.

Keeping data on referral sources will give WIPA personnel an indication of which population groups are being reached successfully, as well as those requiring more outreach attention. WIPA Project Managers will want to examine beneficiary demographics to make sure outreach efforts are penetrating the various sub-groups of Social Security beneficiaries with disabilities in the local service area. In some cases, projects may be missing certain age groups, such as transition-age youth, or beneficiaries over the age of 60. In other cases, projects may find that their outreach efforts are not attracting various disability groups or minority populations. All of this information has important implications for WIPA projects in terms of outreach design and delivery. WIPA projects are not able to evaluate how effective outreach efforts are if they fail to collect data and review it periodically.

Refining Strategies to Increase Priority Referrals

----- When reviewing outreach results, it is helpful to remember the saying: "If you always do what you have always done, you will always get what you have always gotten." If WIPA projects want to attract customers that they have not attracted in the past, they will need to change their outreach strategies. WIPA projects need to take a critical look at the groups they are presenting to and the methods of making contact with these groups. Are there different approaches that could be tried that might work better with under-represented groups? Talk to members of the WIPA team, brainstorm on techniques and ask stakeholders for advice on contact methods. Outreach strategies need to constantly evolve to stay fresh and keep targeted audiences engaged and interested. As projects make changes, be sure to review previous data and compare the data to see if the changes are actually effective in terms of increased referrals.

Accommodating Disability and Cultural or Ethnic Differences when Conducting Outreach

----- SSA clearly intends WIPA services to be made available to all eligible beneficiaries regardless of disability, ethnicity, gender, race, age, or any other characteristics. This important issue is covered in detail in Unit 6 of Module 6. It is strongly recommended that WIPA personnel read this unit before conducting outreach in the community in order to guarantee that all participants are able to participate in, and benefit from, outreach activities. Here are a few tips to keep in mind when designing outreach activities that will include ALL potential participants:

1. Make certain outreach events are held in locations that are physically accessible to all beneficiaries, regardless of disability.
2. Bring materials or handouts in a variety of formats including large print, Braille, and copies on CD.
3. If there is any chance that an interpreter would be needed to accommodate participants who are deaf, have a certified interpreter attend the event. Make sure potential attendees know how to contact the project to indicate if an interpreter is necessary.
4. Include interpreters when outreach activities are conducted in areas with high concentrations of persons who speak a foreign language. Be prepared in advance to meet participant needs!
5. Offer outreach meetings in a variety of locations and at a variety of times to accommodate transportation needs and different work schedules.
6. Be aware that many beneficiaries do not drive and will not be able to attend activities which are not accessible by public transportation.

7. If families are invited to outreach activities, offering free or low-cost childcare will increase the likelihood that people will be able to attend.

CONCLUSION

Under the WIPA initiative, CWICs are part of a larger team of people who are dedicated to improving employment outcomes for people with disabilities. CWICs have an important role to play on this team, but it is not a role that can be played in isolation. Conducting outreach to disability services organizations and other community stakeholders is the critical first step in being included on the “team” for each beneficiary served. When community agencies that support people with disabilities in achieving their employment goals know about and utilize WIPA services, the entire team functions more efficiently and achieves better outcomes. WIPA projects must make an ongoing effort to get the word out about the availability and importance of work incentives planning and assistance services. WIPA personnel must make sure that their partner agencies understand the services WIPAs provide as well as whom WIPA projects are intended to serve. It is only by mutual understanding, cooperation and collaboration that our shared goal of employment for SSA beneficiaries with disabilities will be realized.

CONDUCTING INDEPENDENT RESEARCH

Policy & Practice Brief produced by Cornell University, School of Industrial and Labor Relations, Employment and Disability Institute entitled, “Conducting Outreach to Transition-Aged Youth: Strategies for Reaching Out to Youth with Disabilities, Their Families, and Agencies that Serve Them.”

This paper is available online at: http://www.ilr.cornell.edu/edi/publications/PPBriefs/PP_25.pdf



Tips for Identifying a WIPA Services Candidate

The primary objective of the WIPA program is to promote employment and enhance self-sufficiency for beneficiaries of the SSA disability programs through the provision of work incentives planning and assistance services.

A strong candidate for WIPA services must first be eligible for services. To be eligible, all a beneficiary has to meet are the basic criteria required by the Social Security Administration:

- ▶ At least age 14, but not yet full retirement age,
- ▶ Disabled per SSA's definition, and
- ▶ Already receiving Social Security benefits based on disability (SSI or a Title II disability benefit such as SSDI, CDB or DWB).

Second, in order to be a high priority for WIPA services, a candidate needs to present a need related to employment. The following types of individuals would be considered a high priority for WIPA Services:

1. Individuals who are already employed with urgent benefits issues that could cause employment loss or reduction.
2. Individuals who are already employed who require assistance with managing work incentives to maximize the financial benefit from working.
3. Individuals with job offers who need information in order to make a decision about accepting employment or individuals who have already accepted employment and will begin work soon.
4. Beneficiaries who are actively looking for work, who are receiving job placement/job development services, or who are actively planning for self-employment.
5. Beneficiaries who are already employed but are considering a job change of some sort for which work incentives counseling is needed.
6. Individuals who are preparing for employment and are strong PASS candidates.

If a WIPA eligible beneficiary presents a low-priority need, it does NOT mean that services will be denied. However, a low-priority candidate would receive low intensity information and referral services of short duration, typically delivered by phone with supplemental information provided by email or mail. Individuals who would be considered low priority for WIPA services would include:

1. Individuals who are in the very early stages of career exploration and want general information about the effect of earnings on benefits.
2. Beneficiaries who may consider paid work in the future, but have no immediate plans to become employed or to prepare for employment.
3. Individuals who are not interested in pursuing employment or self-employment.



Competency Unit 2

Collaborating with Other Key Stakeholders to Promote Employment of SSA Beneficiaries with Disabilities

INTRODUCTION

WIPA programs are required by SSA to develop collaborative working relationships with other community agencies and make direct referrals to community agencies for employment services. The WIPA initiative recognizes that to truly support the work efforts of beneficiaries, benefits planning services must be fully integrated with other employment and support services available to the beneficiary in the local community. Developing, managing and maintaining effective collaborative relationships with multiple organizations providing employment and support services are essential to the overall success of the WIPA initiative.

WIPA projects are expected to assume an active role in helping beneficiaries to plan for employment and to access the services and supports needed to make employment possible. This emphasis on return to work and employment outcomes requires that CWICs not only understand the array of employment services and resources in the community, but that they effectively partner and maintain strong working relationships with these agencies over time to support the work goals of beneficiaries. Taking the time to build these partnerships can make the job of the CWIC much more manageable, as opposed to working in isolation. Collaboration with partner agencies allows the CWIC to concentrate on his/her area of expertise, knowing that the other partners are assuming responsibility for assisting the beneficiary in other areas related to employment. At a minimum, the agencies that CWICs need to form partnerships which include:

- ▶ The Social Security Administration (SSA)
- ▶ State Vocational Rehabilitation Agencies (SVRAs)
- ▶ Employment Networks (ENs) under the Ticket to Work Program
- ▶ State or Regional Workforce Investment Boards (WIBs) and local One-Stop Career Centers
- ▶ State/local Mental Retardation/Developmental Disability agencies
- ▶ State/local Mental Health/Chemical Dependency/Substance Abuse agencies
- ▶ Centers for Independent Living (CILs)
- ▶ State Protection & Advocacy Agencies (P&A)
- ▶ Public School Systems
- ▶ Individual Development Account (IDA) Programs
- ▶ US Department of Veterans Affairs and other agencies serving veterans with disabilities

The requirement for WIPA projects to build and maintain strong working partnerships with local agencies will provide CWICs with new opportunities to work as part of an interdisciplinary team. This collaboration requirement includes:

- ▶ Communicating directly with multiple agencies/organizations to build a more comprehensive understanding of their missions, eligibility rules, policies and procedures, and services/supports provided.
- ▶ Educating the employment service/support community on the purpose and role of WIPA in directly supporting the return to work and employment efforts of beneficiaries.
- ▶ Identifying, developing, and implementing formalized strategies and processes for joint employment and work incentive/support planning for beneficiaries.
- ▶ Implementing strategies to build general knowledge of the use of available work incentives to provide access to an array of employment services and supports and how use of these incentives can be incorporated into existing vocational planning, job development, and employment support efforts.
- ▶ Maintaining and enhancing collaborative work with agencies/organizations through on-going assessment of the effectiveness and quality of outcomes for beneficiaries.

This unit will provide specific recommendations about ways to effectively collaborate with community partners to promote employment and enhance self-sufficiency for SSA beneficiaries with disabilities. To begin, we will examine how WIPA projects are expected to work with their primary partner and funding source – the Social Security Administration.

WORKING WITH THE SOCIAL SECURITY ADMINISTRATION

SSA employees are faced with a bewildering array of tasks and functions and most activity is necessarily centered on getting initial claims processed so that benefits may begin. This makes sense since applicants are often in dire need of cash payments and the medical insurance afforded by SSA benefits of all types. While promoting employment may not be considered the most important function for SSA employees, there is a growing awareness within the local SSA offices that helping beneficiaries with disabilities understand how work affects benefits is something that needs to be done. SSA personnel at the national, state and local levels understand that they need the WIPA projects to help with this task.

In order for WIPA projects to work collaboratively with SSA, there needs to be a general understanding of how this agency functions and what the various players do. The most effective CWICs maintain close relationships with their local SSA offices, regional PASS (Plan for Achieving Self-Support) Cadres and the Area Work Incentive Coordinator (AWIC). Locally, CWICs can establish important working relationships for reporting protocols with Claims Representatives and Work Incentive Liaisons (WILs). The following sections provide an overview for how CWICs should work with these SSA employees to help support beneficiaries in achieving their employment goals.

Welcome to the Local

SSA Field Office ----- In order to build positive relationships with local SSA personnel, it is important for CWICs to understand the hierarchy and individuality of the Field Offices. While the positions within each local office will be similar, the culture and management of each office may be vastly different. CWICs must be sensitive to the unique culture of each of the offices that they encounter in their areas of coverage. Local Field Offices are typically comprised of: a manager, an assistant manager, a public affairs specialist, technical experts, Claims Representatives (CRs) and Service Representatives (SRs).

- ▶ **Service Representatives (SRs)** assist the public by answering a wide variety of questions by interviewing the individual, investigating the situation and resolving the problem. Typically, service representatives are the first point of contact when an individual visits the local SSA office.
- ▶ **Claims Representatives (CRs)** assist the public in person, by mail, or by phone to establish entitlement to Social Security benefits. Contacts allow them to obtain, clarify and verify data used to analyze claims and make benefit entitlement decisions. This includes information about return to work.

- ▶ **Work Incentives Liaisons (WILs)** are Claims Representatives (CRs) who act as the designated Work Incentive Liaison (WIL) in addition to their regular CR duties. It is important for CWICs to understand that these are not separate positions. The WIL designation represents additional work requirements for the SSA employee who is selected to serve in this capacity. The Work Incentives Liaison (WIL) is a special designation given to a GS-12 level SSA employee – most typically a Technical Expert (TE) or Management Staff Support (MSS) with expertise in the disability programs and associated work incentives. The WIL acts as an internal resource for other SSA personnel on work incentives issues within that local office. The WIL is the “go-to” person in that local SSA office for all questions about how earned income from wage employment or self-employment affects benefits. When Claims Reps and Service Reps have questions about how to apply the disability program work incentives their first resource is the WIL. These individuals are also the primary contacts on work incentives issues for WIPA projects.

NOTE: Different Field Offices will deploy their WIL in different ways. It is critically important for CWICs to communicate with the manager of each FO in their service area to find out exactly what roles the WIL plays and how the manager expects WIPA personnel to work with the WIL. Never assume that you know how to relate to the WIL – ask!

- ▶ **Area Work Incentive Coordinators (AWICs)** coordinate with Work Incentive Liaisons (WILs) in the local field offices in order to provide improved services and information on SSA’s employment support programs which are structured to assist beneficiaries with disabilities who want to start or continue working. AWICs are experienced employment support experts who:
 1. Coordinate and/or conduct public outreach on work incentives in their local areas;
 2. Provide and/or coordinate and oversee training on SSA’s employment support programs for all personnel at local Social Security offices;
 3. Handle sensitive or high profile disability work-issue cases, if necessary; and
 4. Monitor the disability work-issue workloads in their respective areas.
- ▶ **Public Affairs Specialists** are available to educate the public, community organizations, and media contacts about Social Security programs and benefits. They make presentations and speeches about a variety of Social Security issues.

Establishing Positive Relations with Local SSA Offices – Strategies for Success -----

WIPA projects must not assume that SSA local office personnel know what services are included under the Work Incentives Planning and Assistance umbrella, or even who is eligible for WIPA services. Like all other partner agencies, local SSA offices need to be educated and WIPA staff members need to be introduced. To get the relationship started off on the right foot, the following steps should be taken:

- ▶ **Set up an initial meeting with the manager of each of the local offices that the project serves.** This is the time for the WIPA project manager to introduce the project to the field office manager and to ask his/her preferences regarding CWIC contacts with the staff. This is also an appropriate time to ask if WIPA project staff can attend the next SSA staff meeting to introduce the CWICs and convey the project’s objectives. Another helpful tip at this meeting is to request the name of the WIL, Title II post-entitlement CRs, and a list of SSI CRs by their caseload designation (many offices split the SSI caseload by alphabet or digits in the SSN).

In addition, let the manager know that your project is eager to work collaboratively with the local office to help make beneficiaries return to work efforts a smoother transition for all involved.

- ▶ **Conduct a brief presentation about the WIPA project to the field office staff.** Introduce the CWICs who will be interacting with the local office and explain how the project is conducting business. It is important to ask the local office staff for their input on collaborative efforts and suggestions. The SSA local office staff can be a valuable referral source for WIPA projects.
- ▶ **Maintain regular contact with the office – know the players!** Remember that a CWIC's role is not only to support beneficiaries in their return to work efforts, but also to help them communicate with SSA more effectively. Open communication creates a “win-win” situation for CWICs and SSA.
- ▶ **Offer to collaborate on presentations with the Public Affairs Specialist and/or the AWIC.** Collaboration on outreach enhances the WIPA reputation and referrals. It is important for other community providers to see that WIPA and SSA present a united front to assist beneficiaries.
- ▶ **Get acquainted with the Work Incentive Liaison (WIL) and their back-up contact person.** This is the primary point of contact for CWICs. CWICs must be clear about the role of the WIL in each FO and must know how each WIL wants to communicate with CWICs.
- ▶ **Know who the post-entitlement person is in each office.** This is another key relationship for CWICs to cultivate. The post-entitlement person processes work related Continuing Disability Reviews (CDRs) and is the “go to” person for beneficiary issues with reporting work activity.

Working Collaboratively with Local SSA Offices to Promote Employment

----- WIPA projects and SSA field offices work in partnership in numerous ways. The relationship with local SSA personnel should also never be only “one-way,” but should be fully reciprocal in nature. Cultivating a strong collaborative working relationship with the local office not only benefits the WIPA project, but also SSA, as well as the beneficiaries being served. Visualize each partner – the CWIC, SSA, and the beneficiary – as cooks in a kitchen, working cooperatively to make a pot of soup. Each “cook” will have a different perspective on the recipe and thus contribute different ingredients to make the soup. All of the inputs and viewpoints of the partners must combine to create the best possible outcome. CWICs must remember that they cannot be everything to all beneficiaries; SSA must be an active partner in the provision of services.

In any true partnership, there is a give and take in which each party assists the other and receives assistance in turn. Maintaining a strong alliance with local SSA offices will ensure that the CWIC's job, as well as SSA's job is made easier. Let us take a closer look at exactly how each partner supports and benefits from one another.

How CWICs Assist SSA Personnel:

1. CWICs can be instrumental in teaching beneficiaries what information needs to be reported and how to report information correctly. By helping beneficiaries report wages and work incentives information correctly, CWICs save SSA workers a great deal of time and effort resolving mistakes and dealing with overpayments.

2. CWICs can provide tremendous assistance to SSA CRs by helping Title II disability beneficiaries develop their work histories and track the usage of their own work incentives.
3. CWICs can serve as interpreters for beneficiaries when they receive correspondence or attend appointments at the SSA office. While SSA employees do receive training on working with persons who may have disabilities that impede communication or limit understanding of complex information, CWICs can still assist by acting as a go-between to facilitate effective communication between the beneficiary and the CR. In most cases, the CWIC will have worked with the beneficiary for some period of time and may have a close trusting relationship with the person. Helping out with the communication aspects is a very tangible way that a CWIC can support SSA personnel.
4. Explaining how the various work incentives are applied is a time-consuming process. CWICs can help beneficiaries understand and apply these provisions correctly the first time, which saves the CR a great deal of work. This can be of particular use during a Substantial Gainful Activity (SGA) determination. When the CWIC develops all the work incentives and presents them in an organized fashion to the CR, SGA determinations become a much simpler task to perform!
5. Many beneficiaries struggle with developing Plans for Achieving Self Support (PASS). When the CWIC helps facilitate this process, it aids the PASS Specialist and helps reduce the amount of time it takes to get the PASS approved. In addition, having a CWIC to talk to about the PASS helps facilitate changes and makes sure transitions go more smoothly.

How SSA Personnel Assist CWICs:

1. One of the most important things SSA workers can do to help CWICs is to provide prompt access to benefits planning queries (BPQYs) for verification of benefits for clients being served. This report is essential since it precedes any individual counseling or advisement. The faster this report can be sent to the CWIC, the faster services can commence!
2. The CR can also help by correcting issues identified from the BPQY such as: undeveloped earnings, work incentives usage, Medicaid/Medicare coverage, etc. In some local Field Offices, the Work Incentives Liaison (WIL) is assigned as a central point of contact to help resolve problems identified on BPQYs.
3. Although the CWIC can help identify work incentives and can facilitate the development of them, only the CR can enter this information into the SSA computer system to adjust SSI payment, or use the information to conduct SGA determinations. When SSA personnel act on the information supplied by CWICs in a prompt fashion, overpayments or underpayments can be avoided.
4. PASS Specialists can be essential when it comes to explaining the PASS rules and requirements to beneficiaries – especially if a PASS is not approved or significant changes are requested. PASS Specialists can also alert the CWIC to potential problems. The CWIC can then assist the beneficiary with resolving these potential problems.
5. AWICs can provide valuable support to WIPA projects by working with local SSA offices that are not applying or processing various work incentives correctly, or are

not responding to BPQY requests in a timely fashion. CWICs need to let AWICs know when problems are encountered so that training and technical assistance can be provided to correct it.

Collaboration

Example:..... Your WIPA project receives a call from the WIL at the local SSA office referring a beneficiary to you, named Bill Beneficiary. Bill came into the local office asking for assistance with funding for some training so that he could learn new job skills and eventually become self-supporting. The WIL felt that he might be a good candidate for a PASS plan. As you gather information and verify benefits, you discover that Bill has worked since becoming entitled to SSDI, and that this has not been reported to the Social Security Administration. Based on Bill's pursuit of employment training and interest in receiving WIPA services, you enroll Bill in the WIPA program and develop a Benefits Summary & Analysis report so that he is able to make an informed choice about pursuing the PASS. After reviewing the BS&A, you assist Bill in developing a Work Incentives Plan. While you are helping him to develop the PASS plan, you are in contact with the regional PASS Cadre, to ensure that the PASS contains all of the information the specialist will need. Meanwhile, You are working with Bill and the Claims Representative at the local SSA office to properly report wages and complete a Work Activity Report, as well as completing an SSI application (part of the PASS requirement).

Common Questions CWICs have about Working with SSA Field Offices

SSA employees have a great many responsibilities and multiple demands on their time and attention. Unless CWICs have introduced themselves to the local FO staff, it is quite possible that these personnel will be unaware of the WIPA project and unfamiliar with the services CWICs provide. This problem can be substantially minimized by taking the time to conduct formal introductory meetings with each FO in the service area. These meetings cannot just occur once as SSA experiences staff turn-over just like all employers. There will always be new employees who may not have been made aware of the WIPA initiative. Another strategy is to take the most recent version of SSA's Redbook on Work Incentives on any visit made to the local FO. If a Service Rep or Claims Rep is unfamiliar with the WIPA initiative, there is a clear summary of this program in the Redbook which can be shared.

Another area where CWICs sometimes struggle with understanding is the strict confidentiality requirements to which SSA adheres. When CWICs are working with beneficiaries, there is no "automatic" sharing of information between WIPA projects and the SSA. In order for SSA to release ANY information about a beneficiary to a CWIC, the appropriate release forms must be signed and sent to the SSA staff person. WIPA projects are required to use the approved SSA release of information form (SSA Form 3288 – Consent for Release of Information) whenever they are requesting information about a beneficiary.

In summary, CWICs should remember that SSA personnel are their partners in serving beneficiaries. While the roles of the two organizations are very different, both parties have the same goal of helping beneficiaries become successfully employed. To the extent that CWICs provide assistance to the local SSA office, the workers in that office will be more likely to cooperate and help. This cooperation will save the CWIC valuable time and energy when assisting beneficiaries with SSA work incentives.

COLLABORATING WITH AGENCIES PROVIDING EMPLOYMENT SERVICES AND SUPPORT

Since the focus of WIPA services revolves around promoting employment, CWIC's must work collaboratively with a variety of other agencies involved in providing employment services and supports. The CWIC will be just one member of the team of professionals who form the individual's "employment support team." It is important to remember that each of the partners is working to achieve one common goal – enhancing an individual's self-sufficiency through successful employment. No single entity can achieve that goal alone; it requires continuous cooperative effort to realize the common goal. Each member of the interdisciplinary team has a role to play. This is a symbiotic relationship, the advantage being that each team members work load becomes lighter by working together as a group.

The Employment

Support Team----- Every beneficiary will be different in terms of who is involved in their return to work effort. Each individual will come to the WIPA project with a unique mix of agency support or assistance. Occasionally, CWICs will encounter individuals who literally have no external support. In these instances, the CWIC needs to work with the beneficiary to determine if employment services are needed and if so, which agency would best meet the presenting need. The most common agencies represented on a beneficiary's employment support team would include the following:

- ▶ DOL One-Stop Career Centers
- ▶ State Vocational Rehabilitation (VR) Agencies
- ▶ Employment Networks (ENs)
- ▶ Public Schools
- ▶ Centers for Independent Living
- ▶ Community Rehabilitation Providers
- ▶ Private Rehabilitation Companies
- ▶ Agencies serving veterans with disabilities including the VA

Each of the above entities provides different types of services to beneficiaries seeking employment. Some services may be very narrowly defined while others may be very comprehensive. Keep in mind that a complete description of each major stakeholder agency is provided in Unit 3 of Module 1. At times, it may seem that the various partners working with a beneficiary are providing duplicative or overlapping services, but this is seldom the case. Every member of the employment support team brings their own unique perspective to the table to reach that one common goal – successful employment. The members of an individual's employment support team may change as goals in the plan are met. Each beneficiary will have a very individualized lineup of players on their team.

Let us not forget another critical partner...

Another member of the employment support team that may not be as obvious is the PABSS project. PABSS or Protection and Advocacy for Beneficiaries of Social Security, is an integral part of the employment support team in that they provide employment-related advocacy services to beneficiaries. Refer to Unit 3 of Module 1 for a detailed explanation of PABSS services. There may be times that not everyone lives up to the beneficiary's expectations and there may also be conflicts between the various agencies. These are the times to refer individuals to the PABSS to get them involved as an active partner on the employment support team. The goal of the PABSS Program is to:

- ▶ Assist beneficiaries with disabilities in obtaining information and advice about receiving vocational rehabilitation and employment services.
- ▶ Provide advocacy or other related services that beneficiaries with disabilities may need to secure or regain gainful employment.

How CWICs assist other partners on the employment support team:

1. CWICs offer in-depth knowledge about SSA's work incentives and employment initiatives to their partners on the employment support team. Not only do CWICs educate beneficiaries on the available work incentives, but they also educate provider agency staff. Community partners have a need for this information for a variety of reasons; the primary one being dispelling fears of employment caused by misinformation about the impact of earnings to benefits.
2. CWICs can also educate community partners on the WIPA program eligibility criteria and scope of services. This will enhance the number of eligible and appropriate referrals sent to the project.
3. One of the most important ways that CWICs can assist other partners is by providing thorough analysis of an individual's benefits situation and then identifying critical timelines in benefit transition in regards to employment goals. Getting the job is only the first hurdle that a beneficiary will encounter. Once the job is obtained, the tendency is to forget about what happens down the road. The CWIC can be instrumental in guiding the journey so that bumps in the road are anticipated and planned for in advance.
4. There are so many integral pieces to an individual's benefit puzzle that it can be difficult for beneficiaries to navigate. They often rely on their support team to guide the way. CWICs have access to knowledge and resources to provide information on other federal and state benefit programs that interact and are affected by employment, such as Medicaid, food stamps, housing, etc.
5. CWICs have direct access to SSA, and can assist in development of previous work that may impact future work and benefits. Many times beneficiaries do not have a clear recollection of their prior work activity. Access to the information on the BPQY can help trigger the beneficiary's memory when developing a resume, or completing applications.
6. CWICs have access to a wide variety of community resources and can act as a link between agencies to provide referrals for additional services that may be necessary for the beneficiary.
7. CWICs help other partners to meet their agency goals in relation to placements. Every agency that provides some type of employment service has measurable goals that determine the success of the project. CWICs can have an impact on those agency goals via the information they provide to both beneficiaries and providers. Knowledge of the work incentives encourages beneficiaries to work, thus impacting the number of successful placements achieved by provider agencies.

How other partners assist CWICs:

1. Other partner agencies can help CWICs by providing quality referrals to ensure that beneficiaries get work incentives information. If, as an employment provider, they are working with a beneficiary on an employment goal, they are providing the WIPA project with a referral of an individual who is eligible for WIPA services. This can help limit the initial screening process to determine eligibility, which in turn saves valuable time.
2. The Work Incentive Plan is largely directed by the beneficiary with the assistance of the CWIC. There will be many tasks identified in the WIP that can be delegated

to other members of the employment support team. This will lessen the load on the CWIC and allow more time to work with other eligible beneficiaries.

3. Other partners also have access to information and services that may be outside the CWICs area of expertise. Employment support team members are active advisors in the employment process and can help to connect beneficiaries to other necessary services.
4. Education and information from other partners about their scope of services and eligibility criteria is invaluable for the CWIC. Not only can this enhance services that a CWIC can offer to beneficiaries, it also allows them to be better referral sources for the partners themselves.
5. Other community agencies that are part of the employment support team can provide other avenues for outreach to beneficiaries. CWICs are charged with reaching a wide variety of different populations, and collaboration with agencies that serve some of these specific groups can enhance the WIPA project's exposure to beneficiaries.

Collaboration

Example:..... Let's continue on with the example of Bill Beneficiary, who was referred to the WIPA agency by the local SSA office. The PASS Specialist requests that Bill obtain a vocational evaluation to determine whether the job goal that Bill is considering will be feasible, given his aptitude and his medical condition. You discuss the various options available in your community for the vocational evaluation – the State VR program and local ENs and you assist Bill with selecting the most appropriate option. You refer Bill to the state Vocational Rehabilitation agency for an evaluation, and also to see if there are services that they can provide that will assist Bill in his job goal. With Bill's permission, you provide the VR counselor with a copy of the Benefits Summary and Analysis and the Work incentives Plan that you have developed. The three of you sit down and discuss the benefits planning information, as well as the development of the PASS Plan. This information helps Bill and his VR counselor to determine the best course of action in developing an Individualized Plan for Employment (IPE) with appropriate goals and supports. In return, the VR counselor provides you with a copy of the vocational evaluation. The information contained in the evaluation leads Bill to decide to change his job goal slightly, to better account for the local job market. You assist Bill in adjusting his PASS accordingly. The VR counselor is impressed with the valuable information provided by the WIPA agency, and she refers another of her consumers for benefits counseling.

Common Questions CWICs have about Working with Employment Support Team Members

One of the most common misconceptions employment support team members have is that beneficiaries are only able to work part time if they want to retain cash benefits and critical medical insurance. While this may be the case for some beneficiaries, it most certainly is not true for everyone. CWICs need to fight this misconception at every opportunity by showing employment support team members how working more than a few hours each week can be of financial benefit to individuals. It is quite possible to work full time and not lose full cash payments in the SSI system and even if work causes the loss of SSI cash payments, 1619(b) extended Medicaid coverage pro-

fects the vast majority of people from losing essential Medicaid coverage. In the Title II program, some beneficiaries have the potential to earn far more than they receive in monthly SSDI or CDB payments. To hold these individuals back to part time employment is a shame when full time work could offer a far superior financial outcome while maintaining Medicare coverage. CWICs should remember that an important part of their role in working with employment support team members is educating them about how work really affects SSA disability benefits. CWICs must continue to reiterate the “message” of WIPA services as described in Unit 2 of this Module with employment support team members.

Another issue that CWICs have when working with employment support team members relates to helping these individuals understand the role and function of WIPA services. There tends to be widespread belief among employment services providers that CWICs can and should assist their clients with every issue or problem related to benefits. Unfortunately this often includes seeking assistance with adverse medical CDRs as well help appealing overpayments which are activities WIPAs are not permitted to engage in. WIPA projects can avoid problems of this nature by educating employment support team members about the focus on WIPA services and repeatedly reiterating the limits on WIPA services. It is also suggested that CWICs spend some time educating employment support team members about how they can provide assistance to beneficiaries in these non-employment related matters. Finally, CWICs need to stand firm in providing only those services which are authorized and focusing on beneficiaries who present with needs close to the WIPA mission. To the extent that CWICs stray from their mission, employment services providers will be continue to seek help with activities which are beyond the scope of WIPA services.

Finally, CWICs sometimes get frustrated with receiving referrals on beneficiaries only after a significant problem has been created by going to work. Rather than referring individuals to the WIPA project early on in the process of preparing for employment, some employment services providers use the local WIPA project as a damage control mechanism. Again, this is an educational issue. CWICs need to invest time in teaching employment services providers about the importance of early intervention when it comes to benefits counseling and planning. This type of education is an ongoing process which must be repeated over and over again.

COLLABORATING WITH OTHER COMMUNITY AGENCIES

SSA beneficiaries with disabilities receive services and supports from a host of community agencies beyond those that help with vocational or employment issues. In some cases, these agencies have a significant influence in the lives of beneficiaries and can seriously impact return to work efforts or even the decision to pursue employment. It is not enough for CWICs to coordinate their counseling efforts only with members of the employment support team – there are many other entities that need to be involved if CWICs are to promote work and enhance self-sufficiency. This section will examine these agencies and the various roles they play in the lives of SSA beneficiaries with disabilities.

Agencies Providing Residential Services and Supports

Beneficiaries come from all walks of life and will present all manner of support needs. While some individuals may live completely independent lives in the community with no agency involvement, others may live in small communal residences such as group homes or halfway houses, be assisted by supported apartment programs, reside in nursing homes or institutions, or even be staying in emergency shelters for individuals who are homeless. CWICs need to work with the agencies providing residential services and supports because SSA disability benefits are typically used by these agencies to pay for some or all of the cost of residential care. If a beneficiary loses

cash benefits, residential service agencies may not be able to recover the cost of the care they provide, or the beneficiary may literally have no way to pay for rent or other residential costs. The residential service providers have a significant stake in the financial status of the beneficiaries they serve. Residential agency personnel are often very concerned about the impact of paid employment on benefits and may actively discourage beneficiaries from working due to fear of benefit loss.

Agencies Providing Case Management Services.....

It is not uncommon for SSA beneficiaries served by the state/local MR/DD system or the mental health system to have a designated case manager. In most cases, individuals receiving case management services will have severe disabilities which affect decision-making ability. Case management services typically include planning for services and supports that individuals with disabilities will need, arranging services or benefits, and coordinating the various service or benefit components. In some cases, the case manager may act as the beneficiary's representative payee with SSA, or the case management provider may offer professional representative payee services. In many programs, case managers also are available to provide crisis intervention or problem resolution services when difficulties arise. Case managers often work closely with the beneficiary's family or other legal guardian to plan and coordinate services. When the beneficiary has no family involvement or other support network, case managers may act as the only party responsible for insuring that the individual's service needs are met.

How CWICs assist Residential Providers and Case Managers:

1. CWICs are an excellent source of information about SSA benefits and how work impacts these benefits. They can be of tremendous assistance to residential service agencies and case managers when dealing with individuals who are already working or who want to work. CWICs can answer questions, provide technical assistance and offer training to help staff understand the SSA work incentives. By providing supports of this type, CWICs can help these professionals view work in a more positive fashion and ease fears about how paid employment will affect cash benefits, medical insurance, or Medicaid waiver eligibility.
2. CWICs can act as an intermediary between residential providers or case managers in handling problems individuals are having with their SSA benefits. Disability professionals who are not accustomed to communicating with SSA often do not know how to interact with the local office. With just a little training and support, residential providers and case managers can learn to communicate effectively with SSA personnel.
3. Residential providers and case managers often do not know what information needs to be reported or how to report this information. CWICs can provide specific instructions in this area to help beneficiaries avoid overpayments, underpayments or other benefit problems.
4. CWICs can use their work incentives expertise to show residential service providers and case managers ways in which beneficiaries can increase their total available income by working. It is unfortunate that well-intentioned disability professionals sometimes keep beneficiaries at very low income levels out of fear that paid employment at any level will cause ineligibility for cash benefits and medical coverage. In addition, most disability professionals do not know that SSI recipients can own businesses and homes, or that Title II disability benefits are not means-tested at all. It is unfortunate that so many SSA beneficiaries have so few assets when they could be building wealth in allowable ways.

How Residential Providers and Case Managers assist CWICs:

1. Residential agency staff and case managers can help CWICs perform much of the “legwork” surrounding benefits issues or use of work incentives. Once trained, these professionals can accompany beneficiaries to appointments at the local SSA office as well as handle meetings with the Medicaid eligibility determinations agency, the food stamp office, or the local Housing Authority. CWICs simply do not have the time to provide personal assistance with all of the important meetings or appointments that arise, but some beneficiaries simply cannot manage these appointments independently. The residential providers and case managers provide tremendous assistance in this area!
2. CWICs also rely on residential staff and case managers for help with day-to-day reporting of income and managing benefits. These professionals also have regular contact with beneficiaries and are readily available to help interpret correspondence, collect documentation for work incentives or communicate critical information to the employer or family members. The CWIC relies on these professionals to be their “eyes and ears” and to notify them whenever help is needed or problems arise.
3. Sometimes CWICs need help communicating with beneficiaries. While the residential provider or case manager may have a long-standing and trusting relationship with the beneficiary, the CWIC may have only met with or talked to the individual once or twice. Case managers can help CWICs explain the work incentives in a manner that is understandable to a beneficiary. They can also help the CWIC understand the preferences or desires of individuals who may have communication barriers.

Collaboration

Example:..... As you continue to work with Bill Beneficiary and his VR counselor to access the services and supports he needs to become successfully employed, you learn that one of the goals on Bill’s IPE is to work with a case manager from the local Area Mental Health agency. Case management services were recommended as part of the VR assessment process, to assist Bill with coordination of services such as counseling and medication management, as well as helping Bill to manage the array of paperwork and reports that he must complete in order to maintain benefits such as Medicaid and Food Stamps. You and Bill meet with the case manager and VR counselor to discuss how each member of the team can best assist Bill in reaching his employment goal. The Benefits Summary and Analysis you prepared helps the case manager understand how Bill can reach his employment goal while still retaining his Medicaid and his Medicare insurance, which is necessary for him to remain medically stable. The case manager agrees to assist Bill with reporting and recordkeeping responsibilities, which becomes part of the Work Incentive Plan. After the meeting, the case manager calls you to refer another consumer that he is working with, and is also referring to VR for assistance with getting a job.

Common Questions CWICs have about Working with Residential Providers and Case Managers

As indicated, residential services providers and case managers may have tremendous influence in the lives of beneficiaries. Although the majority of residential service

providers work for agencies whose stated missions are to promote independence and autonomy of their clientele, the CWIC must remember, that their primary customer is always the beneficiary – not the agencies serving the beneficiary. In some cases, the service provider may have preferences that are not in alignment with what the beneficiary wants. In other cases, the service provider may actually not be working in the best interests of the beneficiary. When the CWIC encounters situations such as this, it is important to learn more about the reasons behind the actions of the service provider. There may be more to the situation than is immediately apparent. Is he or she merely following company policy or accepted practices? If so, education and networking at the agency level may help to resolve the issue. Is the issue restricted to the appointed staff member, or is the staff member acting on the wishes of involved family members? Building a strong working relationship with the agency as a whole may also help the CWIC to bring the issue to the attention of appropriate staff at the agency.

CWICs must remain strictly focused on serving the interests of the beneficiary. The advisement WIPA projects provide is intended for the beneficiary first and foremost – not other involved stakeholders. Although agency collaboration is the goal, CWICs are required to carefully guard the confidentiality of each beneficiary and may not share information with any external party without express written permission to do so. When situations arise in which the CWICs suspects that a service provider is not working in the best interests of a beneficiary, assistance should be sought from the assigned Technical Assistance Liaison from the WIPA National Training Center. It may well be that a referral to the State Protection & Advocacy agency or Adult Protective Services Agency will be called for in the most extreme cases.

Working with Other Community Agencies

----- Beneficiaries may be receiving services from a wide array of programs or agencies that the CWIC may want to coordinate with for a number of reasons. In many cases, these agencies are not providing services specifically designed for individuals with disabilities, or they may be providing disability related services, which are more peripheral in nature than those described above. Here are a few agencies that beneficiaries will commonly be involved with that CWICs might want to initiate contact with:

- ▶ **Agencies providing Individual Development Accounts IDAs:** As was discussed in Unit 3 of Module 1, IDAs are asset development programs designed to help people with low-income save money for things like buying a first home, paying for post-secondary education, or capitalizing a small business. Many IDA providers are not accustomed to serving individuals with disabilities and often have questions about what participation in an IDA program will do to SSA disability benefits, Medicaid and Medicare. WIPA projects can offer IDA projects training and technical assistance in this area to relieve these fears. Conversely, IDAs offer beneficiaries a wonderful way to save for a self-employment goal that CWICs need to be aware of when working with beneficiaries. For beneficiaries who also may have a PASS with a self-employment goal, there are some intricacies about how IDAs and the PASS work incentive interface which a CWIC would need to provide. CWICs and IDA providers need to work in partnership to support individuals with disabilities to fully benefit from participation in IDA programs.
- ▶ **Advocacy Agencies:** Some beneficiaries may be involved in peer advocacy or counseling programs operated by local Centers for Independent Living, the National Alliance for the Mentally Ill (NAMI) or may be getting advocacy services from the state Protection & Advocacy agency. It is a good idea to ask beneficiaries about this involvement and to see if the individual wants the CWIC to discuss any issues with the advocate. In some cases, the advocate may be counseling the individual on employment or financial issues and may benefit from information

contained in the Benefits Summary & Analysis. Conversely, there may be information the advocate could share with the CWIC that would be of assistance in the work incentives planning process. Consider asking the beneficiary if coordination between the WIPA project and the advocacy agency would be of assistance.

- ▶ **Disability Support Groups:** There are a great many community agencies that specialize in providing support to individuals who have certain disabilities and their family members. Some beneficiaries may be involved in the local Head Injury Association, the local Down Syndrome Association, or the Spinal Cord Injury Association. CWICs can help these support groups by providing information about the impact of paid employment on disability benefits and disseminating information to the membership about the availability of WIPA services. In return, these groups may become more actively involved in promoting employment among its membership and may refer eligible beneficiaries for WIPA services. To begin a mutually beneficial collaborative relationship of this nature, all it takes is a phone call from the CWIC.
- ▶ **Public School Systems:** Younger SSA beneficiaries with disabilities are often involved in special education programs or services provided through the local public school system. Some schools offer community-based work experiences which may involve paid employment or even self-employment. It is important for CWICs to work closely with special education professionals whenever work experience or paid work is being facilitated to make sure that work incentives are fully understood and utilized. CWICs should also be informing special education teachers about all the benefit changes that may occur around the 18th birthday and should offer seminars to families about these changes as well as the work incentives. In return, classroom teachers can be highly influential in terms of encouraging students and families to consider employment at an early age. They can also be a rich source of WIPA referrals.

Collaboration

Example:..... After working with Bill Beneficiary for several months, he calls you to ask if you would be willing to make a quick presentation about WIPA services to the local support group for the National Alliance for the Mentally Ill (NAMI). Bill has been attending this support group off and on for a number of years, and occasionally writes articles for the NAMI newsletter. He also asks if you could provide him with some information about the WIPA program for the next newsletter. After the presentation, you receive several phone calls from members of the support group. Some of the calls are requests for general information, but one caller, named Ervin, states that he is already working and needs some help understand how to report his earnings to SSA and to the local housing authority. He requests that the advocate that he works with at the Center for Independent Living be involved in any meetings, so that she will be able to assist him with any issues that may arise. The advocate has helped him to dispute an overpayment of his SSA benefits in the past. When the three of you meet, the advocate brings the letters from SSA regarding the past overpayment. These letters contain valuable information about the current status of Ervin's SSA benefits. This saves you a great deal of time in the development of the Benefits Summary & Analysis report. You are able to offer Ervin and his advocate specific information on work incentives that he may be able to claim which would reduce the remainder to the overpayment that he still owes.

CONCLUSION

Work incentives planning and assistance services are an important component of the current national effort to promote employment for SSA beneficiaries with disabilities, but it certainly is not the only component, or even the most essential component in all cases. WIPA services will only be effective in achieving enhanced employment outcomes for SSA disability beneficiaries if they are integrated with effective employment services and supports and supported by all of the other disability services systems. WIPA projects must work collaboratively as part of an interdisciplinary team that includes other key stakeholders to achieve the greatest impact. The net effect of this team effort is that each team member can concentrate on his or her area of expertise, thus making everyone's job easier, and providing the beneficiary with the best chance for a successful employment outcome.

CONDUCTING INDEPENDENT RESEARCH

Disability.Gov: This is a resource website created by the federal government to information about services available to people with disabilities. It includes a feature to search by state: <http://www.disability.gov/>

IL USA: This is a website that explains the history and purpose of Independent Living Centers, and contains a searchable database of IL centers across the United States: <http://www.ilusa.com/links/ilcenters.htm>

U.S Department of Health and Human Services, Administration for Children and Families, Administration on Developmental Disabilities. This website provides links to DD programs and partners, including Protection and Advocacy, in each state: <http://www.acf.hhs.gov/programs/add/>

Career Onestop: This website provides information about One-Stop career centers, along with a state directory: <http://www.careeronestop.org/>

SAMHSA's National Mental Health Information Center: This website contains a mental health services locator by state: <http://mentalhealth.samhsa.gov/databases/>

U.S Department of Health and Human Services, Administration for Children and Families, Office of Community Services-Asset Building: This website provides links to grantees for AFI- IDAs: <http://www.acf.hhs.gov/programs/ocs/afi/>

