



# Ticket to Work: Operating a Workforce EN

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## *Planning Guide and Workbook*

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### **Submitted To:**

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### **Submitted By:**

Maher Disability Employment TA Project

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*Promote the benefits of participating as a workforce Employment Network (EN) and enhance awareness of resources, including guidance and promising practices.*

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### Foreword

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The Workforce EN Planning Guide and Workbook was developed with input from nineteen workforce systems currently operating as Employment Networks (EN) under the Social Security Administration’s (SSA) Ticket to Work program.<sup>1</sup> The insights from the operators of these workforce ENs were generated through interviews and facilitated discussions.

In total, fourteen ENs and five Administrative ENs (AEN)<sup>2</sup> participated in this project. The AEN model is an option to workforce systems for EN operation and is explained in more detail in the section: [Choosing Your Employment Network Model](#). Representation was included from workforce systems that participated in late rounds of the U.S. Department of Labor’s Employment and Training Administration’s Disability Employment Initiative (DEI). It also included representation from workforce ENs that are demonstrating success in engagement of SSA disability beneficiaries and building workforce systems with additional flexible funding that comes as a result of employment outcomes. Thirteen of the nineteen operators included in these discussions reflected experiences of EN operations that are considered “mature” (10 or more years) in their operation.

According to Federal Fiscal Year (FFY) 2020 information from SSA, there are eighty-five workforce systems with active EN agreements. Of these workforce ENs:

- 11 have more than 100 Tickets assigned.
- 21 have more than 200 Tickets assigned during their life of operation as a workforce EN.
- 51 have been operating more than 10 years.
- 22 have generated more than \$100,000 of Ticket income during FFY20.
- 16 have generated more than \$750,000 since becoming a workforce EN.

With regard to the fourteen workforce ENs that were part of the interviews and facilitated discussions, they were selected as being among those in the top echelon of the above categories. The five AEN representatives were selected because they were part of the last three rounds of DEI projects. The benefits and recommendations in this guide are supported by the experiences shared by these nineteen workforce systems. The “Promising Practices and Opportunities” shared in the guide come from these discussions, i.e., insights from the field of workforce ENs.

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<sup>1</sup> An Employment Network (EN) is an entity that enters into an agreement with SSA to either provide or coordinate the delivery of services to these Social Security Disability Insurance (SSDI) and/or Supplemental Security Income (SSI) beneficiaries.

<sup>2</sup> An [Administrative Employment Network \(AEN\)](#) is an association of provider affiliates organized under an EN of Record to combine their resources to function as a single EN to provide appropriate employment, vocational rehabilitation, or support services to beneficiaries with disabilities.

## How to Use this Guide?

The purpose of the Workforce EN Planning Guide and Workbook is to promote the benefits of participating as an Employment Network (EN) and to enhance awareness of available resources to help in this process, including guidance and promising practices. It has been designed to assist state and local area workforce leadership in the process of applying to become an EN and/or who are new to providing EN services. It includes a set of activities (e.g., checklists, discussion questions, exercises) to help walk through the process to make an informed decision.



Throughout the guide, this icon is used to identify best practices and success stories from practitioners in the field.



Throughout the guide, this icon is used to identify an activity designed to further understanding of EN operations or processes. Activities are located in the appendix section of the guide.

### EN Readiness Checklist

This guide is arranged to outline the steps necessary for becoming a workforce EN. The content of the guide is aligned with the EN Readiness Checklist. A workforce EN planning team that completes the checklist, along with the other activities in this guide should have a good idea of where it stands in implementation, along with an operation plan for the workforce EN.



#### Activity: EN Readiness Checklist

The **EN Readiness Checklist** is located in [Appendix IV: EN Readiness Checklist](#) of this guide.

- Before proceeding through this guide, review the EN Readiness Checklist.
- Continue reading the guide and complete the EN Readiness Checklist Activities that are clearly marked in each section. These activities provide opportunities to consider each checklist item individually. They also feature a Likert five-point scale with approximate values to help you consider your EN readiness status in specific areas.
- As you complete each EN Readiness Checklist Activity, return to Appendix IV and enter your rubric score for that item. You will be able to return to the main document to continue moving through the guide.
- When all checklist items are scored, calculate your total score and use the scoring rubric at the bottom of the checklist in Appendix IV to determine your EN readiness.

### Navigating the Guide

To navigate the guide, users may:

- Use hyperlinks embedded in the Table of Contents to go directly to the section of interest or requirement in the guide, to access specific information and resources on that topic; or
- Use this resource as a comprehensive guide by working through all activities from start to finish.

Those that choose to use it as a comprehensive guide will have a completed readiness assessment and operational plan for implementing a workforce EN in the vision of the Workforce Innovation and Opportunity Act (WIOA) developed with the completion of all sections and activities.

In addition, sections of this guide can be replicated and used as desired for internal marketing and awareness development of program managers and professionals in implementation of a workforce EN.

If you have questions or would like additional information about this guide, please contact the U.S. Department of Labor at [DOL.WIOA@dol.gov](mailto:DOL.WIOA@dol.gov). You may also contact the Social Security Administration's Ticket Program Manager<sup>3</sup> at [ENService@ssa.gov](mailto:ENService@ssa.gov) or access the Contact Us page at: <https://yourtickettowork.ssa.gov/contact-us/index.html>.

### Who Will Benefit from this Guide

This guide is specifically designed for workforce systems that are either considering operation as a workforce EN or re-evaluating their current operation. It is intended to complement the instructional modules developed by the Social Security Administration (SSA) for all EN operators with regard to process and operation.

The SSA modules are a comprehensive road map for completing the EN application and getting started with EN operation. Visit the [Service Provider Foundations Curriculum](#) on SSA's Ticket website to learn more. This "onboarding" training will cover all bases for application and operation in terms of a contract and compliance. It also addresses important operational process related to Ticket assignment and payments that are not addressed in this guide.

Please note that SSA outlines specific modules that will be needed by individuals serving in different roles related to EN operation. These modules are also available for existing EN staff that would like a self-paced refresher.

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<sup>3</sup> The TPM is responsible for marketing the Ticket program, administering payments to service providers, and monitoring and ensuring that all Ticket program participants adhere to the rules of the law and the Ticket to Work legislation.

### Desk Aid

The desk aid found in [Appendix I: Desk Aid](#) is designed to be used by workforce ENs as a tool for program staff working with job seekers in the American Job Center. There are two service flow charts reflected in the desk aid. The first service flow chart, American Job Center Service Engagement, reflects the initial engagement of job seekers in the workforce system. The second service flow chart, Program Services, reflects activity of job seekers in programs providing case management level services, in addition to the case management activity required with EN operation.

Since workforce systems vary in service design, this approach is simplified so that it may be customized with the ability to identify individuals or teams in the American Job Center responsible for specific activities in the service flow. Using a tool like this as a “desk aid” in American Job Centers can be a part of staff training and support in their roles in workforce EN activity through replication, dissemination and process orientation.

### Promising Practices and Opportunities

This section of the guide features common workforce EN challenges and demonstrated solutions/practices to address those that have emerged through discussions based on insights from workforce ENs.



## Introduction

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The Social Security Administration's (SSA) Ticket to Work Program (Ticket program) provides Social Security disability beneficiaries more choices for receiving employment services. Beneficiaries become eligible for the Ticket program when they start to receive Social Security Disability Insurance (SSDI) and/or Supplemental Security Income (SSI) benefits. An Employment Network (EN) is an entity that enters into an agreement with SSA to either provide or coordinate the delivery of services to these beneficiaries.

Studies have shown that the American Job Centers (AJC) are already serving persons receiving SSA disability benefits and providing important support for beneficiaries who want to work.<sup>4</sup> The U.S. Department of Labor (DOL) encourages public workforce system entities to become active ENs as part of its comprehensive effort to expand the capacity of the AJC network to serve people receiving Social Security disability benefits.<sup>5</sup> Further, the Ticket program automatically deems public workforce system entities as qualified to become ENs.<sup>6</sup>

### Vision of the Workforce Innovation and Opportunity Act (WIOA)

"Under WIOA, partner programs and entities that are jointly responsible for workforce and economic development, educational, and other human resource programs collaborate to create a seamless customer-focused one-stop delivery system that integrates service delivery across all programs and enhances access to the programs' services."<sup>7</sup>

"There was a point in time where disability agencies said that they couldn't send clients to the job center, because we weren't able to serve them. This has been an opportunity to change that. It was slow going at first; the Disability Employment Initiative was very helpful to us in getting started. We addressed our capacity system-wide to include people with disabilities through the development of professional capacity through the engagement of the expertise of other programs, and the active use of the Integrated Resource Team strategy. We addressed how the overall environment is 'welcoming' to people with disabilities."

~ Michelle O'Camb, County of Sacramento Workforce EN

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<sup>4</sup> "[Use of One-Stops by Social Security Disability Beneficiaries in Four States Implementing Disability Program Navigator \(DPN\) Initiatives.](#)" Washington, DC: Mathematica Policy Research and Center for Studying Disability Policy, May 2010, Gina Livermore and Silvie Colman. Retrieved June 15, 2010.

<sup>5</sup> USDOL, Training and Employment Notice No. 16-18, [New Administrative Processes for Public Workforce Employment Networks under the Social Security Administration's Ticket to Work Program](#), March 8, 2019.

<sup>6</sup> Social Security Administration's [Ticket to Work website](#) Public Workforce System Employment Network page.

<sup>7</sup> USDOL, Training and Employment Guidance Letter No. 4-15, [Vision for the One-Stop Delivery System under the Workforce Innovation and Opportunity Act \(WIOA\)](#), (August 13, 2015).

### Benefits of Becoming an Employment Network

Workforce EN operators recognize the increases in flexible funding that can be reinvested in the system, and the opportunity to increase partnership focus as primary benefits of EN operation. There is a strong recognition of the opportunity to improve system outcomes for individuals with disabilities and to use the “lessons learned” in operation to improve programmatic access of AJC services to more individuals.

“Operation as an Employment Network makes our response to people with disabilities more deliberate as a system, assuring that we all serve them as opposed to finding a way to refer them to another agency.”

~ **Claudia Barrios, SkillSource Workforce EN - Virginia**



## Seven Benefits to Workforce EN Operation

- **More people with disabilities achieve employment outcomes** – All of the reasons lead to this! The effort that goes into successful EN operation, and increased system capacity that occurs leads to more people with disabilities being engaged in work in their communities.
- **Generate more flexible funding to invest in customer services** – The Ticket program provides a proven revenue source that can complement state and Federal resources. It is discretionary funding, allowing flexibility with how ENs use the income. It capitalizes on work already provided to people with disabilities with additional payments for job placements.
- **Increase capacity of workforce system to enhance AJC services to more people with disabilities** – Many ENs invest Ticket income in staff with expertise to help build the capacity of AJC programs to increase the service response to and inclusion of job seekers with disabilities. Increasing skills, knowledge and resources in a workforce system makes it more likely that people with disabilities, including people with more significant disabilities, will be able to be engaged in the career pathway models developed within the workforce system partnerships.
- **Increase the quality of customer service for all customers** – A workforce EN reinforces WIOA priorities of a customer-focused workforce system. By becoming an EN, the AJC increases expertise in serving specialized populations and strengthens partnerships with VR, local organizations and employers, which enhances customer service that benefits all job seekers.
- **Increase collaboration or service alignment in AJC customer service** – Engaging VR as a core program in Workforce EN operation supports state WIOA requirements to enhance partnerships and work with multiple service systems. Cross training of professional staff that supports operation of an EN increases alignment of customer service for all customers.
- **Address a priority in the local workforce plan to increase employment outcomes for people with disabilities** – Many local boards establish objectives in engagement of people with disabilities in the labor market and career pathways. Workforce EN operation is a strategy, with Ticket payments, among other indicators, serving as evidence of system impact. It supports meeting performance measures through employment, earnings and retention.
- **Advance racial equity and disability justice for underserved members of the community** – The Ticket program supports and reaches all individuals including people of color and others who have been historically underserved, marginalized, and adversely affected by persistent poverty and inequality.

## Stage 1: Envisioning the Operation of a Workforce EN

The process of becoming a workforce EN is organized into three stages. The first stage includes activities and readiness questions to consider operation as a workforce EN. The next two stages walk through the process to become an EN followed by operation as a workforce EN. The “envisioning” stage walks through the different processes and practices associated with the operation of a workforce EN.

### Workforce System Alignment

Before completing the EN Readiness Checklist, it may be important to first understand alignment in customer service delivery in the workforce system. The way in which the WIOA core, required and other programs align services in the AJC is a manifestation of customer service culture that may dictate decisions with regard to EN model operational oversight and service staffing.<sup>8</sup>

WIOA promotes alignment of workforce development programs in the provision of employment services for all job seekers. Creating a seamless customer service design has been a challenge for local workforce systems and establishing an EN adds an additional dimension to this challenge. In creating the operation of the system as an EN, does the system create an additional “program” within the AJC, or does it seek to “integrate” the EN activity in a seamless customer service flow? The section in this guide on “Workforce EN Operation” and subsection “Oversight” includes an activity, “How does your EN align with the AJC,” located in Appendix VII, that will support leadership teams in responding to this question.



### Activity: AJC Customer Service Alignment

Use the graphic and worksheet located in [Appendix V: American Job Center Customer Service Alignment](#) to identify where the local workforce system aligns on the Integration Continuum.

This is **one of two** activities on alignment. This activity, AJC Customer Service Alignment, will ask you to consider how your AJC has aligned customer service across all programs making services available through the AJC. There will be another activity, EN-AJC Alignment, that will come later in the guide that will ask you to envision how your workforce EN will be aligned in AJC customer service.

<sup>8</sup> See [WIOA Program Partners List](#). This product was developed by the Workforce Innovation Technical Assistance Center (WINTAC), a project funded by the U.S. Department of Education.



## EN Readiness Checklist #1 – Customer Service Alignment of Core, Required and Other Programs regarding services for individuals with disabilities.

Where is the workforce system in regard to customer service alignment in your AJC? (Add your score for Customer Service Alignment of Core, Required and Other Programs to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Isolated
- 2 = Communicating
- 3 = Coordinating
- 4 = Collaborating
- 5 = Integrated

Please note, it is not suggested that workforce systems should operate at the “integration” level in this discussion. Workforce leadership is required to assess their own service culture and develop alignment approaches that will best meet the needs of their community. This tool was developed to facilitate discussion for a collaboration, so that leadership may determine where they are and where they would like to be for planning purposes.

### Choosing Your Employment Network Model

Several EN models have been developed since the passage of the Ticket program. Through WIOA implementation, there is a greater understanding of the differences between service cultures in states and communities. This guide will focus on three examples of workforce EN models that have been established in current workforce systems: local workforce development, state, and administrative.

Local Workforce  
Development  
(LWDA) EN Model

State EN Model

Administrative EN  
(AEN) Model

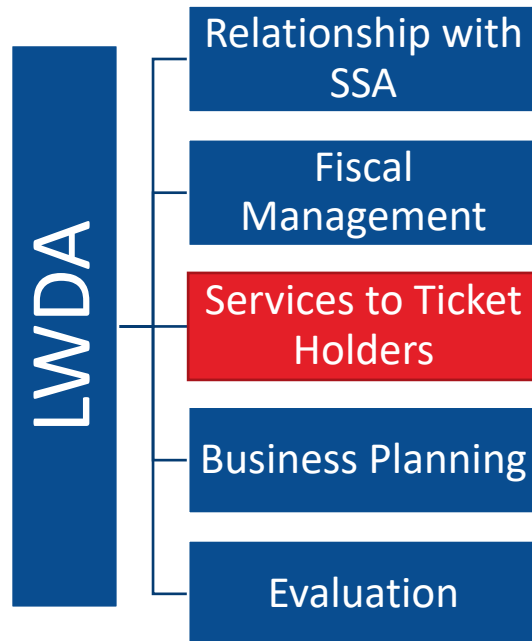
The primary factor in selecting an EN model is determining the entity to handle key administrative functions in relationship with SSA and SSA’s Ticket Portal. The differences between models lie in what entity handles certain administrative functions of operation (note EN Administrative Functions Chart at the end of this section). In all models, it is the local workforce system that engages Ticket holders and

will maintain and report service data as required, either directly to SSA, to a state level management entity or to an Administrative EN, depending upon the model in which they operate.

### ***Local Workforce Development Area EN (LWDA EN) Model***

This model is commonly referred to as a local workforce EN. In this EN model, a local workforce development area (LWDA) is the EN, which includes AJCs within the LWDA. Regardless of whether one AJC or several function in this role, each may serve as a site of service for Ticket holders.

The LWDA provides services to Ticket holders and is responsible for the EN administrative functions. The LWDA may develop an agreement with a local community rehabilitation provider (CRP) to assist with delivering some support services. However, many workforce ENs are able to provide all services to Ticket holders and do not have additional agreements. The operation of the workforce EN and the roles of the signatory programs may be outlined in the local One Stop system's memorandum of understanding (MOU). Additionally, the LWDA EN may also develop a Partnership Plus agreement with the state vocational rehabilitation (VR) agency.



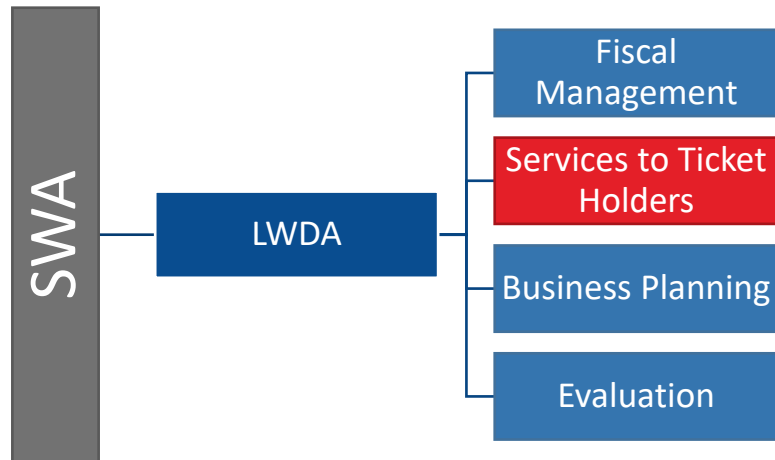
In this model, a local leadership team is responsible for the administrative functions of the EN. The local leadership team should include representation from the agency(ies) with the responsibility for local EN operation, including the administration and operation planning outlined in this guide. Based on the number of AJCs in the LWDA, this EN model may have a primary focus for operation from one comprehensive AJC or there may be multiple comprehensive AJCs that operate together. Additionally, there may be one leadership team for the area with one overarching business plan or there can be separate leadership teams per EN service site with separate business plans. There are LWDAEs where this variation could be more effectively applied due to the size of the community and the strength of resources and partnership in the AJCs.

Single Workforce Area States may operate in this model with a single business plan that operates statewide.

## State EN Model

A state EN model is typically housed within the state workforce agency (SWA), which helps streamline the administrative burden for AJC sites of service. Although this model can be established through many approaches, generally the SWA keeps a small percentage of revenue to support the administrative tasks associated with coordinating this EN model.

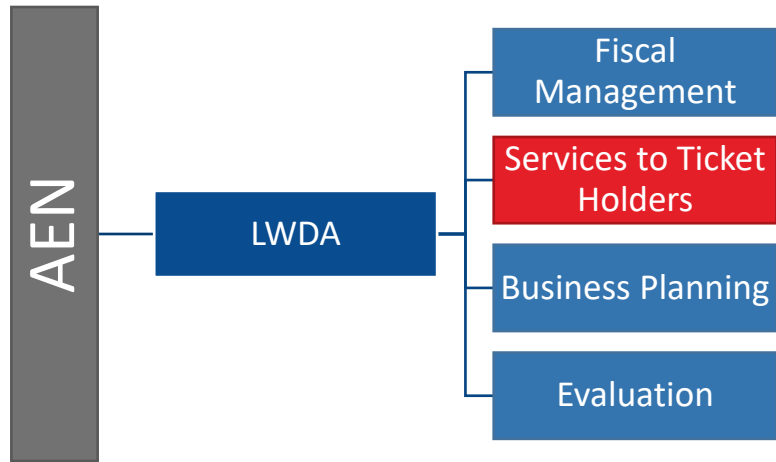
The state EN model centralizes the EN administrative tasks while the services to the Ticket holders are provided at the local level. Use of the state EN model relies on the establishment of local leadership roles and business plans, and local representatives who are dedicated to the work of the EN, such as disability subject matter experts or a disability resource coordinator/navigator. It is not uncommon for the local EN representative to have another role within the AJC, especially at the outset of operation, such as a skill services team member, employment counselor, or a WIOA case manager. Agreements between the SWA and local workforce development boards (LWDB) state the terms of invested efforts and shared revenues. This operating structure may also be reflected in the WIOA state plan.



## Administrative EN Model (AEN)

Similar to the state EN model, an AEN reduces the administrative role for the local service sites, where the agreement and responsibilities with SSA area concerned. AEN models can be comprised of any number of sites, and can be regional, statewide, or national in scope. An AEN model can consist of a mix of “Provider Affiliates,” such as AJCs, community service providers, independent living centers, financial service providers, and other organizations that meet [SSA’s experiential requirements](#). An AEN is a third party organization approved by SSA to engage other entities as “Provider Affiliates” in shared EN operation. Like state ENs, AENs will keep a percentage of revenue to support the administrative tasks associated with coordinating this EN model. AEN Provider Affiliates (workforce system members) will generally start operation more quickly, and have support in outreach and assignment of Ticket holders, in addition to technical assistance and guidance relevant to serving individuals on disability benefits.

In this example of an AEN model, local responsibilities for operation are the same as in the SWA model. A difference is that the centralized administrative role is not an established governance or implementation entity for WIOA (unless a WIOA governance or implementation entity becomes an AEN). At this point, AENs are private entities. The “Provider Affiliate” in this example is the LWDA, and have the same level of service and reporting responsibility as in the state EN model. The LWDA is the operational arm of the EN. AEN members may reflect a national scope of operation and may include many different types of ENs with diverse service focuses.



Visit the [Ticket to Work](#) website to learn more about Public Workforce System EN models.

**EN Administrative Functions Chart**

The following chart provides a side-by-side comparison of the three EN models and the responsibilities of each entity. Of note with regard to Ticket Holder Service Reporting, in the SWA EN and AEN models, the SWA and AEN make this reporting to SSA, but the local entity will still need to report that information to the SWA or AEN in order to support that activity.

	LWDA EN		SWA EN		AEN	
	Local	Local	State	Local	AEN	
<b>Relationship with SSA</b>	x		x			x
○ <b>Contract</b>	x		x			x
○ <b>TPR, services and supports</b>	x		x			x
○ <b>Operate EN portal</b>	x		x			x
<b>Ticket Holder Service Reporting</b>	x	x	x	x		x
<b>Fiscal Management</b>	x	x	x	x		x
<b>Business Planning</b>	x	x		x		
<b>Evaluation</b>	x	x	x	x		x
<b>Guidance and Technical Support for Local Operation</b>			x			x

**Notable Variations to Workforce EN models**

1. State leadership registers with SSA as an AEN – and supports LWDA operation. In that case either SWA or AEN outline applies, but both are very much the same.



2. SWA operates with only state leadership. This is a possible approach in single LWDA states (e.g., Utah, Alaska, Rhode Island). In these cases, it may be more realistic to approach this as an LWDA for planning for this discussion. Regardless of WIOA Governance structure, in some states it may make sense to consider establishing local leadership teams in operation and in decision making on investments of income generated.
3. In some states, even though there are LWDBs operating, the investment decisions and operational planning have been handled at the state level.
4. An LWDA may wish to diversify leadership to AJCs if there are several AJCs operating in an LWDA serving communities of significant size and resources. In this case, it may still be a LWDA EN – but operate in a manner similar to the SWA process identified above.



### EN Readiness Checklist Question #2 – Determination of EN Model

This section described three common workforce EN models. This is significant with regard to planning as it clarifies which entities are addressing critical administrative functions of operation. For this section, how would you score your readiness in the checklist? (Add your score for Determination of EN Model to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Workforce EN model is not determined.
- 2 = Leadership team is currently reviewing EN model options.
- 3 = Leadership team believes it knows which EN model to use.
- 4 = Determination has yet to be approved at leadership level.
- 5 = Workforce EN model has been determined.

### Leadership and Oversight

Determining how oversight will be provided with regard to EN operation is key. Oversight is critical in a number of ways. The method or process by which decisions are made with regard to operation, ongoing evaluation, and program improvement indicate the level of investment and contributions of professionals working across the system, and the degree to which their expertise will be engaged in its success. Regardless of the chosen EN model, effective implementation requires an element of leadership at the local level where the direct service is provided to the Ticket holders.

The ability to provide identified supports in addition to access to career pathway opportunities available to all job seekers, along with quick and accurate information on disability benefits and employment is important for EN success.



### Activity: Leadership Discussion Guide

This exercise, located in [Appendix VI: Leadership Discussion Guide](#), walks through elements to consider in terms of how local oversight and decisions will be made. It complements the steps included in the EN Readiness Checklist to help determine level of readiness to become an EN.

The Leadership Discussion Guide exercise explores operational, growth planning and investment, as well as who and what organizations will be involved.

### Local / State Plan Priority for Inclusion of People with Disabilities in American Job Center Services

Does the local workforce plan (or state plan, if operating in a single workforce area state) contain an objective or emphasis on including people with disabilities effectively in the area's labor pool, and in the services of the AJC? If so, is there a defined strategy to address that objective, along with defined roles for the system's programs and agencies (core, required and other) in the plan or MOU?

If not, workforce leadership might still consider this in future planning. WIOA intends for career pathway models and employment services in the AJC to be fully inclusive of individuals with disabilities.

The operation of the AJC as an EN is a great strategy to expand capacity to include individuals with disabilities. If approached collaboratively, the system will engage the expertise of key “partners” to address programmatic access to all services, and benefit from the flexible revenue that comes as a result of the successes of individuals with disabilities being served. The AJC can reinvest these new resources to improve system capacity to respond more effectively to job seekers with more significant barriers in the future and continue to increase the amount of revenue over time. In this way, investments can be made that benefit all job seekers, including persons with disabilities.



### EN Readiness Checklist #3 – Local / State Plan Priority for Inclusion of People with Disabilities in AJC Services

How would you score your system? (Add your score for Local / State Plan Priority to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Employment outcomes for individuals with disabilities are not a priority in local plan [or state plan if state EN model]
- 2 = Local plan (or state plan if state EN model) identifies services for people with disabilities, but does not reflect priority for outcomes for individuals with disabilities.
- 3 = Local plan [or state plan if state EN model] prioritizes employment outcomes for individuals with disabilities.
- 4 = Local plan [or state plan if state EN model] prioritizes employment outcomes for individuals with disabilities and includes a strategy which is the responsibility of one of the programs.
- 5 = Local plan [or state plan if state EN model] prioritizes employment outcomes for individuals with disabilities and describes targets and strategy to improve as a system.

### Plan for Section 188 – Programmatic Access in American Job Center

How does the system evaluate programmatic access of its services for persons with significant disabilities or other barriers accessing the full benefit of AJC services? It is one thing to plan ahead and create a service process that is universally accessible for all. It is equally important to have clear processes in place on disclosure of disability and need for an accommodation to support that individual in having the same service access as others to achieve the same service outcomes. Accessibility and responsiveness should go hand in hand, and the inclusion of the expertise of all of the AJC programs in the effort make the process more effective.



## EN Readiness Checklist #4 – Plan for Section 188 – Programmatic access in AJC

How would you score your system? (Add your score for Plan for Section 188 to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Programmatic accessibility is not addressed in AJC certification; and there is no plan with regard to addressing and improving programmatic access.
- 2 = Customer service for people with disabilities and access is handled separately by program.
- 3 = Information on processing requests for service accommodation are publicly posted and customer service staff are trained to respond to requests.
- 4 = Joint training is available to AJC program staff on customer service for people with disabilities.
- 5 = AJC certification includes a review of programmatic access and a plan is established to improve programmatic access implemented across programs

### EN Leadership and Program(s) that will provide oversight is/are established (including VR)

This section focuses on the EN operation within the system operation of an AJC or workforce system. The vision of WIOA for customer service as a system can be extended to the operation of a workforce EN. Nationally, there are examples of workforce ENs that engage the diverse expertise of all core programs operating in an AJC, through a collaborative structure such as a disability and employment subcommittee that reports to a local board. There are also examples of successful ENs that operate as separate and unique programs in and through the AJC.

With a collaborative EN structure, investments can be made using the diverse expertise of all programs in building the capacity of the AJC to be more responsive to all target populations using the flexible resources generated by the EN. Operating as a separate additional program in the AJC, decision making on service approach and other decisions can be made by a single entity more nimbly but increases the challenge in building partnerships and accessing the expertise and resources of the other programs for Ticket holders served by the EN.

In a collaborative oversight model, the VR partner, and other community organizations identified as stakeholders in the success of a workforce EN can be included in oversight and decision making. Whether a totally collaborative oversight design, or as a single entity that reports separately to a local

board, it remains in the best interest that activity be driven by the priorities for system service identified in the local plan, and with the model for customer service outlined in the MOU with the local board.



### EN Readiness Checklist #5 – EN Leadership and Program(s) that will provide oversight is/are established (including VR)

How would you score your system? (Add your score for EN Leadership and Program(s) to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = A single program or agency has oversight and implementation responsibility for the workforce EN operation.
- 2 = A single program operates the EN on behalf of the LWDB (or SWA), but engages leadership of other programs that operate in an advisory capacity in all but Ticket income investment decisions.
- 3 = A single program operates the EN on behalf of the LWDB (or SWA), but engages leadership of other programs that function in an advisory capacity in operational and investment decisions.
- 4 = LWDB has engaged a core group of programs in the AJC to oversee the EN operation and recommend investments to the LWDB of Ticket income.
- 5 = LWDB has established a process that engages the expertise of all core and required programs and key community programs in oversight of EN operations and investments.

## Determining the Fiscal Agent

Determining who is managing the flexible funds generated through Ticket income is key. The following set of questions may help guide the decision in determining the fiscal agent that makes the most sense for workforce EN operation.

### *Discussion Questions*

- How will the leadership role of the EN operation reflect the governing structure (including work groups and committees of that governing body) already established for workforce system operation, or is it designed differently?
- If the same, is the governing body's fiscal agent suited to serve this role for the EN as well?
- If the leadership role is comprised of entities separate from the governing body (including work groups and committees of that governing body) is there a more suitable entity positioned to operate as the fiscal agent on behalf of the system?

- How will plans for growth and investment of future income from EN operation effect the decision of who will serve in the fiscal agent role? For example, the growth plan may include the employment of subject matter experts operating in the workforce system or purchasing items or services to support the success of specific job seekers.
- If the EN is initiated at the state level, what is the plan for dissemination of Ticket income to local areas that serve Ticket holders? How will this identify roles of state and local level fiscal agents?
- How will the fiscal agent work with the EN operator/leadership team to provide regular reports of payments that will support overall program evaluation and growth planning?



### EN Readiness Checklist #6– Determination of Fiscal Agent

How would you score your system? (Add your score for Determination of Fiscal Agent to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Assignment of fiscal agent has not yet been determined.
- 2 = Leadership team has identified and approached an entity to operate as the fiscal agent on behalf of the workforce system.
- 3 = The fiscal agent has agreed to serve, but has not met with the leadership team/operator for orientation on the Ticket program.
- 4 = The fiscal agent is identified and in process of completing basic orientation with leadership team/operator.
- 5 = The fiscal agent is identified and operating/prepared to operate in this capacity.

## Stage 2: Process to Become an EN

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The second stage highlights eight critical processes and practices for the workforce system to align EN activity with workforce system operation<sup>9</sup> in preparation for the EN Application:

- Suitability Clearance
- Complete SSA “Onboarding” Training Modules
- The IWP, Case Management, and Notes
- Service Provided
- Determination of Payment System
- Reporting
- EN Application
- Agreements: Agencies and Partners

### Suitability Clearance

Suitability clearance represents a SSA background investigation process. A favorable determination is required to provide EN processes, such as Ticket assignment. Most critical to receive suitability will be the individuals that communicate with the SSA Ticket Portal and those that handle personally identifiable information (PII) related to Ticket operation. The paperwork for suitability clearance may be completed in advance of the EN award, but cannot be submitted until an award (contract) number is generated and can be included in the paperwork.

For operating workforce ENs, the required paperwork must be submitted at least 30 days prior to the date that an individual is to begin work on behalf of the EN.<sup>10</sup>

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*All workforce EN personnel that are required to access Social Security beneficiary personally identifiable information must first have a favorable suitability determination. Clearance is also required to access the SSA Ticket Portal to check beneficiary EN Ticket status and Ticket assignment.*

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<sup>9</sup> For a comprehensive road map in completing the application and getting started with EN operation, visit the [Becoming an EN](#) page on SSA’s Ticket website. This “onboarding” training covers all bases for application and operation in terms of a contract and compliance in operation. Please note that SSA outlines [specific modules](#) that will be needed by individuals serving in different roles related to EN operation.

<sup>10</sup> For more information, review training and resources found on Completing Suitability ([link to https://yourtickettowork.ssa.gov/program-operations/suitability.html](https://yourtickettowork.ssa.gov/program-operations/suitability.html)) and For more information, review training and resources found on Completing Suitability ([link to https://yourtickettowork.ssa.gov/Assets/yttw/docs/information-center/resource-documents/program-resources/ssa-en-security-and-suitability-business-process-guide-june2018-remed.pdf](https://yourtickettowork.ssa.gov/Assets/yttw/docs/information-center/resource-documents/program-resources/ssa-en-security-and-suitability-business-process-guide-june2018-remed.pdf)).



## EN Readiness Checklist #7– Suitability Clearance

What is the stage of the Suitability Clearance process for these staff? (Add your score for Suitability Clearance to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Individual(s) not identified for suitability clearance yet.
- 2 = Individual(s) identified and preparing materials for submission to suitability clearance process.
- 3 = Individuals identified and in the suitability clearance process.
- 4 = Individual(s) identified and in the suitability clearance process, and completing the SSA onboarding training.
- 5 = Key individuals have been cleared through the suitability clearance process.

### Complete SSA “Onboarding” Training Modules

SSA provides a [comprehensive training overview](#) of EN operation. Key operators, contacts, leadership, and individuals engaged in key administrative tasks should complete the training as recommended at this site. This overview addresses all EN functions with which operators should be familiar. The information in this guide directly addresses how this activity is aligned in a workforce system.

### The IWP, Case Management, and Notes

The Individual Work Plan (IWP) is the planning document that identifies the career objective for an individual who has assigned a Ticket to the EN. While all programs providing an intensive level of services in an AJC already have employment plan documents required for use by separate funding streams, SSA has its own requirements.<sup>11</sup> SSA does recognize that many AJCs have made an effort to create a common individual employment plan form and will review those forms to determine whether they can be approved for use of workforce EN operation.<sup>12</sup>

ENs maintain a record of services provided and progress of the Ticket holder in case notes, and other means of tracking services. While SSA will have evidence of progress by the individuals served based on income information they receive, there will be ongoing requests for information by SSA in the **Services and Supports Review**, including the **Certification of Service** and **Timely Progress Reviews**.

<sup>11</sup> To learn more about [preparing an Individual Work Plan](#) on the SSA Ticket website.

<sup>12</sup> See an example of a [customized workforce IWP template](#) that has been approved for use by workforce ENs. This template has been developed to support workforce ENs as a possible reference guide to adopt.



### Service Provided

The EN Request for Application (RFA) requires a list of the services the EN will provide to Ticket holders. These will include, at a minimum, career planning, job preparation assistance and ongoing support after placement for as long as the Ticket is assigned. Anything within the scope of services offered to job seekers in the AJC can be included, in addition to services that can improve the outcomes for job seekers with disabilities. Please keep in mind, that while the provision of ongoing follow-along services may be beyond an AJC's current capacity for customer services, this provision will maximize beneficiary success and generate financial investment from SSA.

### Determination of Payment System

ENs receive financial compensation from Social Security for Ticket assignments that achieve predetermined milestones and outcomes associated with work and earnings. Workforce ENs have generally selected the Milestone/Outcome Payment System over the Outcome payment system as they will receive earlier initial payments as an individual becomes employed if the individual is working a trial work level (TWL) even if the person has not yet achieved substantial gainful activity (SGA). With the Outcome payment system, an EN can earn more overall with an individual that works off of benefits, over time, but the payments do not kick in until the individual is working over SGA.<sup>13</sup>

### Reporting

SSA's reporting considerations and requirements through the Ticket Program Agreement include:

- **Annual Performance Outcome Report (APOR)** – annual update of the operational status of the EN, including partnerships, services and staffing. **Note: Workforce ENs are NOT required to complete an APOR. This information is included here, as users will see references to this in SSA Information and onboarding training.**
- **Security Awareness Training (Form 222)** – verifies training provided to those with security clearance. This annual training addresses the handling of personally identifiable information. Generally, at the end of February or early March, SSA will request this verification.
- **Services and Supports Review, including Certification of Services** – SSA conducts an annual “Services and Supports” review (requests may be made at other times). SSA will identify specific individuals for a review of case file information and progress. This review includes Certification of Service for specific individuals and case notes. Occasionally, these may be conducted as a “site review,” but it is possible that they may be conducted virtually in the future.
- **Time Progress Review (TPR)** – requests initially go to the beneficiary. If the beneficiary does not respond, a request will go to the EN to identify information that supports a decision on “timely progress” while a person is in Ticket assignment. In order to continue with protection from having a “Continuing Disability Review,” the beneficiary must demonstrate timely progress with the activity in their IWP. These benefits and responsibilities should be discussed thoroughly with the beneficiary when the “assignment” decision is made, and while completing the IWP.

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<sup>13</sup> To learn more about the [milestone/outcome and outcome payment systems and e-pay](#) option under the Ticket program on the SSA Ticket website.

### EN Application

A Request for Application (RFA) must be completed to become an EN.<sup>14</sup> The RFA explains the duties of an EN, requirements for award consideration, and directions for submitting an application.<sup>15</sup>

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*Public workforce systems are already deemed qualified by SSA to operate as Employment Networks.*

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The discussion of the different EN models in Stage 1: Envisioning the Operation of a Workforce EN, noted which party will hold the agreement and report directly to SSA. This is the entity that will complete and hold the Ticket Program Agreement. If this entity is a collaboration of entities, consideration will be how that entity is established and if there is a single member that will be representing the full entity in completing the RFA.



### EN Readiness Checklist #8– Application Status

What is the status of EN Application for the Workforce System? (Add your score for Application Status to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Application has not been completed yet.
- 2 = Application not completed – in process of establishing leadership role, or lead entity.
- 3 = Application not completed – leadership role established, but identifying EN model.
- 4 = Application not completed – but leadership role and EN model has been established. Working on components of service (business) plan.
- 5 = Application is completed and Ticket Program Agreement is in place.

### Agreements: Agencies and Partners

Social Security will award ENs a Ticket Program Agreement (TPA), which has a 10-year period of performance. Once awarded, the TPA becomes the EN's statement of work. It lists the compliance requirements of the Ticket program and should be stored for easy reference.

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<sup>14</sup> To access the [Request for Application](#) on SSA's website along with other useful information.

<sup>15</sup> On the [Ticket to Work website](#), you can access the RFA along with other resources available to workforce ENs.

If the EN operation of a workforce system is established within the WIOA vision, then it makes sense that the priorities and customer service be reflected in the state and local plan. The roles of AJC programs in EN operation can be outlined in the MOU with the LWDB. If the operational service design for the EN operation cannot be addressed in this manner, or the nature of the design will include agreements with additional agencies that are not included in established MOU(s) with the local workforce areas, then additional agreements may be established.

### ***Vocational Rehabilitation and Partnership Plus***

With a Partnership Plus agreement, SSA can compensate both a state VR agency and an EN that serve the same beneficiary under the same Ticket during separate periods of time.

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*Under the Partnership Plus agreement, this can occur if the state VR agency has served the beneficiary under the traditional Cost Reimbursement program (available to state VR agencies only) and VR and EN services are provided sequentially, not concurrently. However, in an aligned workforce system, Ticket holders engaged with VR in the Cost Reimbursement program will still access career services available through the AJC to all job seekers.*

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Ticket holders may obtain services from employment providers including ENs and state VR agencies. Participating in the Ticket program and partnering with a state VR agency to provide services to Ticket holders supports state WIOA requirements to enhance partnerships and work with multiple service systems. Partnership Plus agreements serve to clarify Ticket assignment and customer service practices with regard to VR services and workforce EN activity.

### **How can a Partnership Plus agreement benefit a Workforce EN?**

Partnership Plus allows a Ticket holder who is served by a state VR agency to assign the Ticket to a workforce EN after the VR case is closed. Under this model, phase 2 milestone and outcome payments are available to the workforce EN. This partnership is important for the long-term success of an EN, and also important to the state's VR system, as it helps to:

- Provide long-term supports to VR customers
- Reduce VR recidivism
- Increases payments state VR agencies are likely to receive through traditional Cost Reimbursement due to EN support to Ticket holders in promoting employment stability
- Assist in producing EN revenue

A solid Partnership Plus relationship benefits customers because it provides long-term supports that are not always available to all VR customers.



## EN Readiness Checklist #9 – Partnership Plus Agreement with VR

What is the status of an agreement with the state VR agency? (Add your score for Partnership Plus Agreement to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Not pursuing a Partnership Plus agreement.
- 2 = Not pursuing a Partnership Plus agreement – but engaging in discussion between VR and workforce system on EN operation.
- 3 = Working on a Partnership Plus agreement.
- 4 = Have a draft of a Partnership Plus agreement.
- 5 = Partnership Plus agreement is in place and guides Ticket “in use” and assignment in local area.

## Stage 3: Workforce EN Operation

Stage 3 covers the following three key processes and practices of operating as a workforce EN:

- System Operation
- Oversight
- Workforce EN Operation Plan

### System Operation

Stage 2 provided an overview of considerations for preparation of workforce EN operation. Before addressing the workforce EN operation plan, it is helpful to put this in the context of the workforce service culture. The designation of the most appropriate roles for operational oversight depends on this as well as the vision of possible changes in service structure to the overall system. The operation plan will include components of the business plan outlined in the RFA but have a broader base that aligns the activity with overall workforce systems operation.



#### Activity: How does your EN align with the AJC?

Review examples of EN Operation according to alignment level in [Appendix VII: How does your EN align with the AJC?](#)

In general, how do you envision the EN aligning in your AJC?

- Isolation
- Communication
- Coordination
- Collaboration
- Integration

This is the **second of two** activities on alignment. The current activity, How does your EN align with the AJC, will ask you to envision how your workforce EN will be aligned with AJC customer service. The previous activity, AJC Customer Service Alignment, looked at how the AJC has aligned customer service across all programs.

The first step in establishing the context for the operation plan is to articulate your vision of how the workforce EN operation will align with customer services offered within the workforce system. Recall the activity completed in Stage 1 using the information in Appendix V: AJC Customer Service Alignment.

This activity supported the “EN Readiness Checklist item #1 – Customer Service Alignment of Core, Required and Other Programs” as either Isolation, Communication, Coordination, Collaboration or Integration in your AJC. There is no right answer for workforce EN Operation in this alignment. The structure that a workforce entity begins with in the formation of the workforce EN operation may be difficult to change later on, as leadership investment and activity may grow in alignment or apart from the overall customer system based upon how it is established. Use the examples in Appendix VII “How does your EN Align with the AJC” to identify your plan for workforce EN alignment.

### Oversight

In completion of the activity located in Appendix VII: How does your EN align with the AJC, determine how AJC leadership will be connected with the entities for overseeing and operating the workforce EN. Is it operating system wide and benefitting from the expertise of all programs operating in the workforce system, or is it operated as a separate independent program within the workforce system?

Leadership can be established within existing operational structures within the workforce system, or through the creation of a new entity or role.

### Workforce EN Operation Plan

An operation plan is necessary for the effective execution and implementation of the EN. An EN operation template is located in [Appendix XII: EN Operation Plan](#). There are seven elements of an EN operation plan which are necessary to ensure all aspects of implementation are planned and addressed:

Outreach / Intake / Assignment

EN Services

Professional Staff Qualifications

Partnership

Key Support Services

Evaluation / Program Improvement

EN Growth Plan: Ticket Revenue Investment

### **Outreach/Intake/Assignment**

Marketing and Outreach: How will the workforce EN effectively identify potential Ticket holders? What are the outreach methods?

- Will registration for AJC services include a voluntary question about disability status?
- Will registration forms include a question about SSA disability benefits?
- Will the SSA Ticket Portal be used to check Ticket eligibility or if a customer was a previous Ticket holder?
- Will training events examine SSA work incentives as a way to draw beneficiaries to the AJC?
- What media will be used to market new EN services?
- How will social media or online platforms be utilized?

Marketing and Outreach: How will the EN market to community service providers and other referral sources?

Consider the agencies within the community that should be aware of the new service being offered to SSA beneficiaries in the AJC. Consider also how the workforce EN will partner with existing ENs that may be operating in the local community.

Will marketing materials be developed to use for outreach to beneficiaries? Will there be targeted marketing within the AJCs?

Consider other materials that may be used (which may already be developed), which are specific to your EN services.

### **Ticket Holder Assessment**

After determining EN services, it is time to consider an initial assessment process. Knowing the target audience will help in the development of an initial evaluation of the characteristics considered to be a “good fit” for selected model of EN services. For example, most AJCs/ENs are likely to utilize the career services, support systems and expertise that exists in AJCs, for all customers, as a base for customer service. As this is the likely model of services the EN will provide, think about a set of logical questions to ask of any potential Ticket holder, which will help streamline the workforce EN intake process.

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*Workforce ENs vary with regard to their approach in Ticket assignment. Many are open to assignment of individuals with a wide range of support needs, intent on engaging the diverse expertise of internal and external partnerships to respond to each Ticket holder. Others are more selective in identifying individuals with support needs that are more of a “fit” to identified resources and supports within the workforce EN. In planning, each should decide which method works best for the EN operation model of service accordingly.*

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### Identify the Target “disability demographic” for the workforce EN:

- All individuals that have Tickets and an objective to work off of disability benefits.
- Individuals with disabilities that are determined to reach their career objective using the career and individualized services currently available in the AJC.
- Individuals that exit VR services and are working at “substantial gainful activity” level (at an income level that will cause them to leave the SSA benefit roles).<sup>16</sup>
- Other

### Assignment

Once the Ticket holder demographic is identified, the next step is to develop, or adjust, an existing assignment process. It varies from EN to EN; however, an Intake tool will involve the gathering of key information for evaluation. Each EN will customize this process, based on their service delivery model. For workforce ENs, this could be the AJC registration form or a supplemental form with additional key information.

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*ENs should assign Tickets of individuals that choose to accept opportunities and supports needed to find and keep employment, increase their earnings, and reduce their dependence on disability benefits. To do so is to operate in alignment with SSA’s intention of the program. This doesn’t mean that every person assigned a Ticket will work off of benefits, or even that they are confident of working off of benefits at the beginning, but it must be their objective to explore the path to work. Together, with the EN, they will then follow the activities in their IWP to achieve that objective.*

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Established workforce ENs have expressed that there are many steps in providing some Ticket holders with the successful work experiences and supports needed to gain the confidence required to eventually come off of disability benefits. AJCs by design should still serve these individuals but may not assign their Ticket until an objective to work off of benefits can be established.

If the workforce system does not have an AJC registration process as a basis to make the EN connection for Ticket holders, programs will need to develop their own processes for capturing and sharing this information across programs, so Ticket holders are identified and engaged in the assignment process. Remember, this is a process used by ENs that choose to assess individual cases to determine who may be a “good fit” for services based on their EN operation model.

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<sup>16</sup> To be eligible for disability benefits, a person must be unable to engage in substantial gainful activity (SGA). The amount of monthly earnings considered as SGA depends on the nature of a person’s disability. ([Social Security Administration Substantial Gainful Activity](#))



Does the system have a standalone intake form, or are there plans to develop a supplement to the AJC registration form?

If the system will use a standalone or adjusted intake, the information collected may be used to determine which Ticket holders are the “best fit.” The assessment will require knowledge of the Ticket program payment structure, Ticket holder skills assessments, and SSA disability benefits planning. Other factors should be considered in accordance with an AJCs standard evaluation for services.

Has the workforce EN identified which staff member(s) will conduct the intake, and/or, who will be involved in the evaluation of which Ticket holders it will decide to serve?

### **EN Services**

What kind of services will the EN offer?

SSA requires that ENs provide core services to Ticket holders under the TPA: career counseling, job placement, and long-term follow up supports. Specific programs operating in AJCs are not designed to provide long-term supports (beyond program “exit”). The EN operation plan should determine how these ongoing supports will be provided.

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*If the AJC has a strong focus of service alignment, and promotes services to job seekers as a single entity, it can do the same in promoting support as an EN. “Aligned” workforce ENs establish an operation plan to engage Ticket holders in the same services available to all job seekers, and emphasize strategies to increase supports that are particularly useful to individuals with significant disabilities. This includes disability benefits counseling or advisement.*

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Being able to identify and market the services the EN provides is an important step in the development of an EN. Typically, the services provided by a workforce EN are services currently offered by the AJC combined with work incentives guidance. Initially, the EN may identify the services offered locally and as the EN evolves, this piece can be reviewed and expanded.



### **Activity: EN Partner Profile**

Download and complete the [WIOA Partnership Profile template](#) from the WINTAC web portal. This activity will help identify the local partners within the workforce system and the appropriate points of contact for decision making and operations.

Will workforce EN Ticket customers be “standalone” cases with the EN operating as a single program, or will the services be those offered by AJC programs braided with support services established as a result of the EN activity?

Many workforce ENs are finding that the career support needs specific to most Ticket holders naturally indicate the benefit of a braided service approach, such as the Integrated Resource Team (IRT) model (featured in a later activity in this guide). This type of strategy engages the expertise of multiple programs within and outside of the AJC. Consider how the Ticket holders served by the EN will benefit from these strategies, and how they might be incorporated into the EN operation model.

Are there additional service delivery options considered in preparation for operation as an EN (e.g., Asset Development, Financial Coaching, Benefits Advisement)?

Will the EN provide services that support self-employment outcomes?

Self-employment is a complex employment option to pursue, but sometimes it is the right choice. SSA takes additional rules associated with self-employment into account. For example, SSA does not consider gross earnings in cases of self-employment; rather, they consider the Net Earnings from Self Employment (NESE). This is also what the Ticket Program Manager will look at in evaluating whether to pay an EN for achieving Ticket program milestones or outcomes. Sometimes, it can take a longer period of time for a beneficiary to achieve the necessary NESE to achieve payments. It is important to understand upfront that these cases may require a longer investment of time as an EN. If the workforce EN plans to support self-employment outcomes, then additional community supports should be identified that can assist Ticket holders in pursuing this option.

Will the EN serve Ticket holders looking for full-time work, part-time work, or both?

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*Many Ticket holders start out working part-time—even if their goal is to achieve SGA-level earnings and beyond.*

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Developing an assessment process for an EN requires careful consideration. If an EN chooses to serve Ticket holders, for example, who only wish to work part-time, it will not typically be in a position to fulfill the goals of the Ticket program. However, it is possible to serve individuals who possess a high level of skill, who will return to full-time work; this will eventually or immediately lead to SGA level employment.<sup>17</sup> ENs need to consider Ticket holders whose goal is SGA-level employment. However, if all payments are available on a Ticket, it is also possible to serve someone who needs initial placement supports, as long as they achieve at least a trial work level, which is the earning that triggers a Trial Work Period (TWP).<sup>18</sup>

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<sup>17</sup>The SGA level is determined each year by SSA; the monthly gross wages and the amounts are different for beneficiaries who are blind. The current SGA level can be found in the [SSA Red Book](#).

<sup>18</sup> Learn more about [SSA's Trial Work Period](#) including monthly earnings that trigger a trial work period.

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*Remember, the goal as an EN is to assist beneficiaries in becoming self-sufficient and can be a long process to accomplish. It requires thinking strategically about more than just the initial employment objective.<sup>19</sup>*

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### Individual Work Plan

An Individual Work Plan (IWP), or Individual Employment Plan (IEP) must be developed with each Ticket holder. The IWP contains required elements identified by Ticket program regulations. Consider who will develop this plan, and assign Tickets using the SSA Portal. The identified staff member will be required to have suitability clearance in place.<sup>20</sup>

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*Ticket holders may also be enrolled in other service programs at the same time the individual has their Ticket assigned to the EN.*

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This is a positive as it increases the expertise and resources available to the Ticket holder in meeting their career objective. These other programs will require a different work plan following the guidelines of their funding streams. Planning together and maintaining lines of communication with these programs is important to enhance the impact of everyone's contribution.

### Case Management

#### **How will the EN track Ticket holders for efficient business operations?**

Organizing Ticket holder data is an important administrative task. While AJCs have a management information system (MIS) for customer data, it may be more efficient to maintain a separate database for Ticket holders. EN activities may be closely aligned with those of other AJC programs, but SSA periodically requests information with regard to IWP progress. The ability to pull this information (case notes) in response to a "Timely Progress Review," or "Certification of Services" is important.<sup>21</sup>

#### **Who will maintain Ticket holder files, and what information will they contain?**

While SSA has no parameters regarding how to organize Ticket holder files, consider what information is important as well as what is required to have in each file. At a minimum, SSA will require the IWP or IEP (and service notes). However, other documents may also be useful. Below are examples of documents that a Ticket file *may* contain to assist in service delivery and administration of the program.

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<sup>19</sup> Access additional guidance from SSA on [information that should be shared with Ticket holders](#) in determining assignment.

<sup>20</sup> Learn more about developing, amending and storing the IWP on the [Ticket to Work website](#) and view a [learning module](#) to walk through the process, as well as access an ["example" of a completed IWP](#).

<sup>21</sup> More information on these processes can be found at [SSA's "Learning Modules"](#) section of Training and Events.

- 18-Month Prior Earnings Worksheet (not required, but can be helpful if an EN is manually billing for cases). Access the [18-month Look Back Tool](#) found under the topic heading “Tools for Success.”
- Pay check stubs, other proof of earnings, or evidence of self-employment earnings, such as a tax return (not required using ePay).
- Benefits Summary Analysis and Benefits Planning Query (BPQY).
- Consent forms, such as SSA-3288, or consent for local service providers.

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*Regardless of what is in the Ticket holder’s file, the customers’ personally identifiable information must be protected. Secure electronic files may be kept, or paper files for Ticket holders in a locked filing cabinet.*

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### **What is the service approach for long-term support for a Ticket holder after job placement?**

ENs are required to provide the services they identify in the Ticket Program Agreement, including long-term supports, for as long as the Ticket is assigned to the EN. Some workforce ENs may opt to un-assign a Ticket after the beneficiary finds employment. If a workforce EN has concerns about providing long-term support, it is suggested that beneficiary success will be enhanced through coordination with other ENs to establish ongoing support until the beneficiary is independent of benefits.

Nationally, the most successful workforce ENs have built a long-term support system into the EN model of service. Providing for long-term supports in the EN operation plan offers the opportunity to earn the bulk of the available Ticket payments, and leads to a more substantial EN.<sup>22</sup>

### ***Professional Staff Qualifications***

There are many approaches taken by existing workforce ENs in adding expertise to AJCs in order to enhance system response to and inclusion of job seekers with disabilities. DOL disability and employment initiatives have focused on increasing the knowledge and resources to AJCs with a focus of making services in the center physically and programmatically accessible to all job seekers.

Active workforce ENs recommend the addition of an individual dedicated to EN operation. When that individual has disability subject knowledge expertise, it adds value to overall customer service. Successful workforce ENs also indicate having staff trained and certified in SSA disability benefits advisement is necessary to success in responding to the disability community, whether operating as an EN or not – but certainly an indicator in successful EN operation. Here are a few questions that may help frame planning for the placement and support of key staff related to EN operation.

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<sup>22</sup> Learn more by reviewing the most recent [“Payments at a Glance”](#) resource found under the topic heading “Payments Resources”

Provision and Qualifications

**Initial Intake/Basic Assessment**

- What knowledge and skills are necessary in the initial customer contact to identify Ticket holders?
- Does the system include staff with disability subject matter expertise in the job seeker engagement process?
- During basic assessment, how are individuals connected with the expertise of the AJC programs? How is the EN process aligned? What knowledge is required of staff who are in the AJC's initial job seeker engagement process to make these connections?



**Activity: Staff Assignment, Qualifications, and Training**

Use the activity worksheet in [Appendix VIII: Staff Assignment, Qualifications, and Training](#) to map out the staffing needed to support the EN.

**Customer Service**

- How is disability expertise supported or reflected in AJC career services?
- How is disability expertise available to services across programs in the AJC?
- What level of SSA disability benefits and work incentive understanding is expected or established in the AJC?
- If benefits advisement is available in the AJC, what are the qualifications in providing that support? (Refer to the sub section on “Key Support Services.”)

**Long-Term Follow-along Support and Services**

- Will the workforce EN commit to maintain long-term follow-up support for Ticket holders in employment above SGA?
- What ongoing support services will the workforce EN continue to make available to the Ticket holder long-term?
- How will the workforce EN address this commitment? Who will maintain that responsibility?

**Partnership**

*“It is valuable to invite partner agencies to come talk about their operations and break down how we can collaborate. Collaboration supports leveraging of funds so that billable hours is not impacted and ensures everyone gets credit for their work to support an individual. We try to make this conversation central in our partnership. Integrated Resource Teams have been a good way to build our partnerships at a front-line level.”*

**~ Mary McLaughlin, Tompkins County New York**

Included in the WIOA vision for customer service is an emphasis on seamless services. Customer service in an AJC can be improved by placing that complexity of the eligibility determination and enrollment processes behind the scenes and taking steps to align diverse expertise with regard to how customers access it. Many systems are using “customer centered design” strategies to consider collective service engagement from a customer’s point of view.

The service culture (meaning how different services work together) is important for those individuals with multiple barriers to employment who are increasingly likely to benefit from expertise in multiple programs simultaneously. From a top-level down – we look at service alignment. From a bottom-level up, we look at partnership. How do the professionals in the different programs share their expertise in meeting career objectives for individuals that they serve together?



### Activity: Integrated Resource Team Development and Service Approach

This activity includes a list of potential workforce system partners, programs, and community-based organizations along with real world scenarios of Ticket customers to help make connections to what types of services could play a role in achieving employment success.

- Go to [Appendix IX: Integrated Resource Team Activity](#).

### Key Support Services

In designing the vision of a responsive workforce, WIOA intends to include critical support systems as among the required programs in the AJC. As roles are considered for Unemployment Insurance, Senior Community Service Employment Program, Community Services Block Grant agencies, Temporary Assistance for Needy Families and housing programs in a comprehensive AJC, the intent to create an environment for wrap around services for individuals with barriers to meeting career objectives is clear.

Local workforce boards are encouraged to include other programs to address service gaps or support needs not addressed by core and required programs.

### Key Elements to System Operation

Through lessons learned in focus on improving how the workforce system includes individuals with significant disabilities, mature workforce ENs see the following as key elements to system operation.

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*Many workforce systems have invested Ticket program income in these support services in order to enhance the service outcomes for all job seekers with disabilities, and in the same fashion, increase the likelihood that Ticket holders will experience success in the types of outcomes that will generate more revenue for the workforce system.*

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- **System navigation** having an individual with disability subject matter expertise that is also very knowledgeable of the expertise available through all AJC programs, as well as useful community programs to facilitate making warm connections and collaborative service delivery.
- **Benefits counseling/advisement** having an individual certified as a disability benefits advisor/planner who is available with accurate information regarding disability benefits and employment. While many states have a sub-certification level of training to increase awareness, the level of expertise regarded as necessary for this support is that established for a “Certified Work Incentives Coordinator” (CWIC) that is offered through Virginia Commonwealth University. There are other comparable levels of training for this role, and these are found in Appendix III: Workforce EN Resource Directory, under the section on National Ticket Training and Resource Centers.



### EN Readiness Checklist #10 – Benefits Advisement / Counseling / Planning

What is your plan to provide support to your SSA disability beneficiaries with benefits management? (Add your score for Benefits Advisement to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = There is no plan to address benefits advisement with Ticket holders.
- 2 = There is a plan to address this customer need through referrals outside of the AJC.
- 3 = A plan exists to train individuals working in the AJC to provide benefits advisement services to people who assign their Tickets to the workforce EN.
- 4 = A plan exists to train individuals working in the AJC to provide benefits advisement services so that it is available to any SSA disability beneficiary served by the AJC.
- 5 = The expertise already exists in the center, and is readily available to any job seeker that will benefit from this expertise.

- **Financial capability/coaching** through the availability of expertise to support AJC customers in building their individual financial capability and provide direct coaching to individuals with regard to budgeting and spending decisions.

WIOA supports the provision of financial literacy education activities in its Title I programs, and many collaborative systems are beginning to recognize the value of financial coaching to achieving and maintaining success in career growth. Financial capability / coaching complements the value of the benefits advisement services, but takes it further in terms of supporting individuals in good use of available financial services and products, and with regard to stronger money management practices that can make a difference between keeping and losing a job.





## EN Readiness Checklist #11 – Financial Capability / Coaching

Is there a resource in the community that the AJC will be able to tap into for Financial Capability and/or Financial Coaching development for Ticket holders and customers? (Add your score for Financial Capability / Coaching to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Financial capability building supports and financial coaching are not available in the AJC.
- 2 = Financial capability /coaching may be available outside of the workforce system on a referral basis.
- 3 = A work plan (LWDB or EN Growth plan) is developed to increase the availability of financial capability supports or financial coaching to AJC customers.
- 4 = A work plan (LWDB or EN Growth plan) is developed to increase the availability of financial capability support or financial coaching to customers onsite in the AJC.
- 5 = Financial capability supports or financial coaching is available in the AJC.

### ***Evaluation / Program Improvement***

Evaluation of implementation progress and impact is an important part of planning for program improvement over time. The EN evaluation activity (below) is designed to support a leadership team in the development of baselines and objectives that will support ongoing progress and discussions on needed changes and adjustments. This exercise is intended only as a beginning of an evaluation planning process for the leadership team. This activity will go hand in hand with the growth planning and Ticket resource decisions made by EN leadership teams.



## Activity: Employment Network Evaluation Activity

This activity includes a list of system outputs and outcomes and EN outcomes or impact for assigned Ticket holders. Access this activity in [Appendix X: EN Evaluation Activity.](#)

Through this exercise, the EN team will:

- Select the outputs and ongoing review and improvement efforts for the workforce EN. Possible outputs and outcomes are listed in the charts along with space to identify additional outputs and outcomes.
- The exercise is meant to help identify outputs and outcomes for which there is an identifiable method to capture data/information for review.



These data elements will support the system in reporting to SSA as well as in reporting progress to the leadership team. The team might select some to follow, while adding others that match indicators identified in state and local plans to reflect quality customer service.



### EN Readiness Checklist #12 – EN Evaluation Plan

What is the status of an EN Evaluation plan including data elements for review and schedule for leadership? (Add your score for EN Evaluation Plan to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Do not have identified outcomes for EN operation, or evaluation plan in writing.
- 2 = Desired outcomes have been identified but the process for tracking and sharing data has not been established.
- 3 = Desired outcomes and targets have been established and an evaluation plan has been developed, but not yet implemented.
- 4 = Outcomes and targets have been identified for EN operation, reviewed and updated annually by EN leadership team and reported to LWDB and community for input.
- 5 = Outcomes and targets are identified for EN operation and evaluation plan is established in writing as a part of local customer service plan.

#### Impact and Reporting

Reporting is a term used for multiple purposes. A local workforce system is mandated to operate as a single entity with public oversight in terms of the local board and engage community stakeholders. The workforce system includes many components that have different funding streams and systems of accountability that require program reporting.

Workforce ENs are required to complete and respond to ongoing SSA requests for Timely Progress Reviews and Services and Support reviews. These alone, however, are not enough for a workforce system to assess whether the EN operation meets its objectives in enhancing the systems response to job seekers with disabilities.

#### Impact Evaluation

If the EN operation is part of a collaborative local strategy to improve the overall response of the workforce system for citizens with disabilities, it is strengthened through the inclusion of the EN's impact valuation and Improvement recommendations in an annual report to the local board. EN leadership can develop this report based upon an annual review of the indicators identified reflecting the desired customer service impact. Annual targets should be set to provide an opportunity for discussion regarding operational success and suggestions for improvement. This evaluation, discussion and reporting process is critical to the progress and growth of a workforce EN.

Using the operation plan elements outlined in this section of the guide, and an annual review of progress on the impact indicators, this is the final component of an effective strategy for an oversight group in evaluation and ongoing improvement of a growing workforce EN. The following outline is an abridged version of how workforce EN planning will continue to be shaped through ongoing impact evaluation and the use of this information to adjust the EN's operation plan.

- Operational Plan Development
  - Operational design
  - Objectives established
  - Growth Plan
- Operation plan Implementation, including adjustments made as a result of evaluation each year
- Annual Progress Review and Recommendations
- Revision of Operation Plan and Continue Cycle

### **Annual Performance Outcome Report (APOR) – Not Required for Workforce ENs**

The guide includes reference to the Annual Performance Outcome Report because it is identified in SSA guidance for ENs. It is important to note that while responding to Timely Progress Report requests, Service and Support review requests and the annual report on Security Awareness Training, workforce ENs are **NOT** required to submit APORs to SSA.

### ***EN Growth Plan: Ticket Revenue Investment***

Is the EN operation included in the local or state WIOA plan as part of the customer service strategy for the workforce system? Establishing an EN growth plan as a part of the operation plan is an important way for system leadership to guide growth and improvement of EN operation.



### **Example: Growth Plan**

Establishing a “growth plan” for a workforce EN includes beginning with a rough estimate of income from Ticket outcome over time, along with a collaborative plan for investments designed to support capacity building that will increase the potential for more career outcomes that will generate increased income.

- Refer to [Appendix XI: Growth Plan Example](#) to view a hypothetical example of a workforce system growth plan. A “growth plan” should be updated each year, based on EN progress.

For systems where improving inclusion of people with disabilities is established as a priority, the operation of an EN is a strategy that brings systems investment if established in the overall customer service design.

*Strong investments increase the likelihood of stronger Ticket outcomes in the future! For an example of how an EN growth developed in a rural Workforce EN, visit [Iowa's Promising Practice on collaborative Employment Network](#) located on WINTAC's web portal.*

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### EN Readiness Checklist #13 – Growth Plan for AJC with Ticket to Work Resources

As you develop a sense of the ability to generate Ticket income, the EN planning team will be able to consider investments that can address identified needs and gaps. Many workforce ENs have established a “flexible funding” budget line, from the previous year’s income, that the leadership team approves for use with participant support needs on a case-by-case basis.

What is the status of a growth plan for workforce EN operation? (Add your score for Growth Plan for AJC to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = There is not a growth plan in place for EN operation.
- 2 = Plans are in place for EN operation through other funding for an extended period, while plans for Ticket income are designated to be used for other purposes.
- 3 = Plans are in place for covering EN customer services to begin with, and a “wish list” has been established for use of Ticket income as it is generated.
- 4 = Plans for customer service is in place and wish list items have been prioritized.
- 5 = A long-term growth plan is in place, outlining how EN activities are addressed in the first year, and how investments will be made to enhance operation as EN outcomes and income grows.

## Accountability

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After the development of the operation plan that includes growth planning and evaluation components, it is now time to move onto accountability to:

- Social Security Administration
- Community and Local Workforce Development Board and/or State Workforce Development Board
- SSA Disability Beneficiaries
- Programs offering services through an American Job Center

### Social Security Administration

To demonstrate responsiveness to SSA for their investment in the workforce system with Ticket funding, an EN operation provides:

- Security Awareness Training (Form 222) outlining the security training updates and status for individuals established with security clearance for EN operation.
- Timely Progress Reports (as requested).
- Services and Supports Review, which will come in the form of a request for specific information regarding assigned individuals that will include documentation of progress in IWP, including case notes and a “Certification of Service” (as requested).

### Community and Local Workforce Development Board and/or State Workforce Development Board

To demonstrate progress in including people with disabilities, EN activity and investments into the workforce system that can have an impact for all job seekers with disabilities. These systems will establish impact measures that go beyond progress for people that assign their Tickets to the workforce EN.

- Regardless of the width of the impact scope, these ENs make regular progress reports to workforce boards and relevant community stakeholders. This can be viewed more as the impact of a collaborative strategy to address workforce plan objectives to include people with disabilities in services and employment than as a “program report.”

### SSA Disability Beneficiaries

There is an expectation for operating workforce ENs to maintain engagement of each beneficiary assigned in IWP activity continuously until self-sufficiency is demonstrated.

- This requires ongoing progress review and support with each Ticket holder on at least a quarterly basis for the duration of time in which the Ticket is assigned.

- This includes the expert benefits advisement support recommended by SSA, DOL and successful EN operators nationally.

### Programs offering services through an American Job Center

Each program should expect to see a benefit with regard to successful outcomes, and in terms of their ability to serve more people with disabilities. This is an expected result of the investments made into the capacity of the overall system with the flexible funding from Ticket program outcomes.

- To look at this accountability to each program for their investments, evaluation should consider increased benefit experienced by participants of those programs with disabilities in terms of numbers.



### EN Readiness Checklist #14 – Reporting Responsibility

Who is generating EN reports and to whom: SSA, LWDB, Administrative EN, or other? (Add your score for Reporting Responsibility to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Reporting responsibilities have not been assigned yet.
- 2 = Reporting responsibilities are still in discussion along with EN operation plan.
- 3 = SSA reporting responsibilities have been assigned.
- 4 = Reporting responsibilities for SSA are assigned. Plans for engaging the LWDB and community input through reporting are in process.
- 5 = Reporting responsibilities have been assigned to be completed annually for SSA, LWDB and system/community partners.

This section of the guide walked through the steps to create an EN operation plan located in Appendix XII: EN operation plan.



## EN Readiness Checklist #15 – EN Operation Plan

What is the status of the EN Operation Plan? (Add your score for EN Operation Plan to the [EN Readiness Checklist in Appendix IV.](#))

- 1 = Operation plan is not developed yet.
- 2 = Emphasis is on SSA application and a trained local “operator” that can manage Ticket operations in the AJC.
- 3 = Leadership team/operating entity is in process of completing an operation plan using the information from this planning guide and workbook.
- 4 = Leadership team/operating entity has completed initial draft of the operation plan and widening scope of input before putting plan into operation.
- 5 = Operation plan is established that addresses above functions.

## Workforce EN Promising Practices and Opportunities

*“Have **patience with the process**, it is a long-range investment. It is a focus on customer outcomes. It is also ‘systems change’ which requires time. As you get some experience and seeing individuals experience success, you can develop a stronger appreciation for what can be accomplished. You **focus on quality first** and always, and as people experience success, you can get a sense of what to expect so you can **invest it in ways that improve capacity** in a way that makes sense (and benefits planning is one of these things). Every service that you can offer in terms of Ticket are services that you should be providing anyway.”*

~ **Brian Dennis, Workforce Development Center  
Workforce Employment Network, Iowa**

The following represent common workforce EN challenges and demonstrated solutions/practices to address them that have emerged through discussions based on insights from workforce ENs.

### Challenge - Patience needed for EN to mature

There is strong potential for building capacity in all workforce systems as a result of EN operations. With growth opportunities, understanding initial investments to develop an EN that will generate desired returns, and an understanding of how the potential returns will occur over time is very important.

#### **Solution**

- Begin with a clear identification of desired participant outcomes, and a process for evaluating outcomes in the same terms. Plan for providing the services that will address that impact.
- Complete the growth plan with projections of Ticket assignments and income to be used as investments that can build the capacity of the system to increase the impact over time.

While there are workforce ENs generating over \$100,000 a year in flexible Ticket income, there are others that have started and given up in early stages. It requires several years before the financial returns are able to begin to increase system capacity.

### Challenge - SSA operational correspondence goes to program contact and signatory authority only

This is a problem in those systems in which there is a time lag between receipt of communication and when it is communicated or forwarded to the operations professional that is required to respond. Many communications call for time sensitive responses from the EN, which are generally made by the EN

operator, if different than the “program contact” or “signatory authority,” or if that individual has changed, but this change is not communicated to SSA. Sometimes, there are negative consequences regarding Ticket assignment or payments when responses are late or fail altogether.

### **Solution**

- Consideration should be made when determining the program contact and signatory authority.
- Update the “program contact” information with SSA when there is turnover in this role.
- Ensure communication between program contact, signatory authority and other key EN operators is timely to avoid missed deadlines.

## Challenge - Responsive benefits advisement services/supports

This is a concern as the availability of trained expertise is not always available to Ticket holders. Many Ticket holders lack confidence required to make decisions that will result in losing benefits, and misinformation about employment and benefits is a challenge for professionals and beneficiaries alike. When questions exist regarding work and benefits, it is important to respond with accurate information.

### **Solution**

- Many workforce systems have added this expertise (through training and connections with a network of experts statewide for support) to existing staff, or new professionals engaged through the growth of the workforce EN.



### **Workforce EN Success Story**

*“The Ticket program is a great support for young people with disabilities. A young man assigned his Ticket and was able to find employment, receive support in finding the right combination of reasonable accommodations, which included a job coach. This type of support allowed him to not only succeed in his first job, but also move to a new full-time position within the same company. Because of the additional benefits planning and work incentives support, he now has an ABLE (Achieving a Better Life Experience) account helping him to save for his future!”*

**~ Richard Berrena – Springfield, MA**



### Challenge - “Disconnect” between the VR and workforce programs in the AJC

Sometimes a lack of alignment between programs in an AJC is a challenge for customer service. Alignment with VR services for workforce EN operation is problematic when there is not a consistent understanding of customer service alignment or “Partnership Plus” agreements.

#### **Solution**

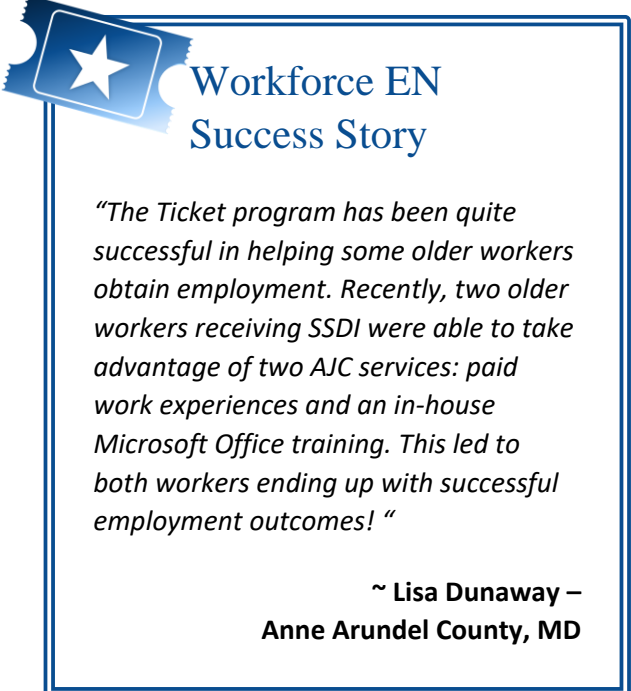
- This can be addressed initially at the management level of AJC operation (including managers/directors of core programs), so common objectives are established for service and support is provided to professionals in all programs to improve customer service alignment.
- If there is no Partnership Plus agreement, this is an important step, as it should frame the service relationship. In addition, the involvement of the VR agency in the workforce EN operation is also strongly suggested in improving workforce EN success and improving system alignment.

### Challenge - Lack of “buy-in” or Investment of key AJC programs

This issue manifests itself both in the identification of individuals already served by partner programs in the AJC and in the engagement of the professional expertise of available services in the AJC for Ticket holders.

#### **Solution**

- Operate the EN as a system of programs that operate the AJC together. Engage programs in the planning of EN operation, and strategies for growth and investment. The expertise should strengthen the quality of the implementation.
- Establish customer service practices which include disability and benefit status disclosure, services and customer supports. Review practices with service professionals in all AJC programs with input and support from their leadership. It is suggested that orientation and discussion on these practices be reviewed with staff on a regular basis. This support to staff can include the use of the desk aid found in [Appendix I](#) customized to be specific to your system.



**Workforce EN  
Success Story**

*“The Ticket program has been quite successful in helping some older workers obtain employment. Recently, two older workers receiving SSDI were able to take advantage of two AJC services: paid work experiences and an in-house Microsoft Office training. This led to both workers ending up with successful employment outcomes! “*

**~ Lisa Dunaway –  
Anne Arundel County, MD**

### Challenge - Staff transition stops momentum

There have been situations in which losing a key individual in operating the EN will cause activity to be interrupted. This can occur in any service program, so it is good to consider how a system of accountability and oversight is prepared to respond to these situations. As functions of the operation are spread across more individuals, the challenges of transition become smaller.

#### ***Solution***

- Having an active oversight process that engages system leadership in staff transition planning.
- Ongoing orientation of AJC customer service staff will support leadership in maintaining EN activity with the loss of a key operator in the EN process.
- Advance notice of staff transition is especially important when additional staff will need to complete the suitability clearance.

### Challenge - Keeping Ticket holders engaged in plan activity

Maintaining ongoing progress in Individual Work Plan activities is an expectation for Ticket assignment. Maintaining engagement with customer service professionals in the workforce system while completing the activity of an IWP is also a positive indicator of success for a Ticket holder.

#### ***Solution***

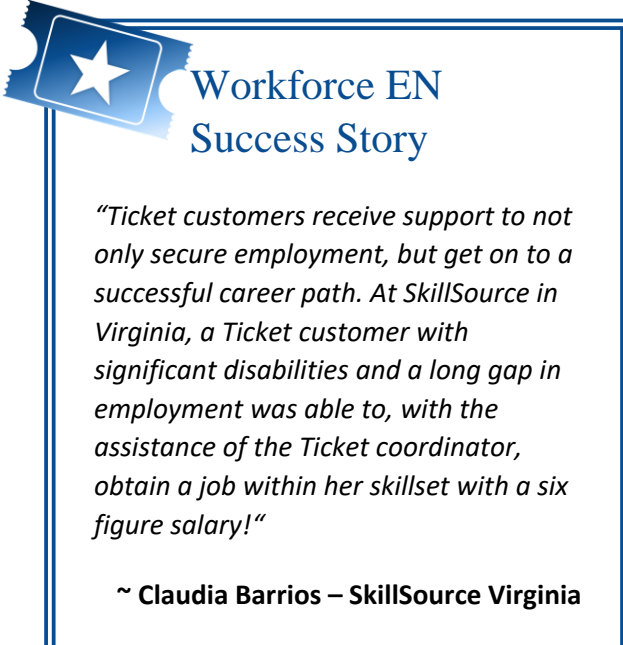
- Establishing the expectation at the outset for ongoing contact, IWP review, and follow-up is an effective strategy.
- Maintaining regular checks on progress with benefits counselors/advisors is another means of staying engaged.

### Challenge - Approaching career counseling with long-term or career pathways perspective

There are many benefits in collaborative EN operation with the myriad AJC programs, but tying into the collaborative career pathways models is one of the strongest.

#### **Solution**

- Support career counseling with the broadest outlook of the available job market, opportunities in the demand industries as well as opportunities for ongoing career growth and promotion. This is a focus that supports participants of all AJC programs.
- Ongoing regular follow-up after placement is another way to support individuals in responding to promotional opportunities over time.



**Workforce EN  
Success Story**

*“Ticket customers receive support to not only secure employment, but get on to a successful career path. At SkillSource in Virginia, a Ticket customer with significant disabilities and a long gap in employment was able to, with the assistance of the Ticket coordinator, obtain a job within her skillset with a six figure salary!”*

~ **Claudia Barrios – SkillSource Virginia**

### Challenge - Guidance for operation is not always clear

A collaborative system works with programs with different guidance and reporting processes at the same time, and this can become confusing.

#### **Solution**

- Take advantage of available technical assistance.
- Network with other successful workforce EN operators that you can approach as you have questions or seek clarification with regard to practice or application.

### Challenge - Marketing / outreach to Ticket holders

There are two areas of focus - internal and external. Internally, the workforce system is already serving SSA disability beneficiaries in many, if not all, of the programs operating in AJCs.

#### **Solution - internal**

- Providing the EN operation orientation to customer service professionals is a great first step.
- Include with the orientation a cross system discussion on disability disclosure, identifying Ticket holders and assignment, and supports/resources that tend to be beneficial for individuals’

dependent on public benefits/support. These can be very useful in identifying Ticket holders already served in the workforce system and assigning their Tickets.

### ***Solution - external***

- Take advantage of promoting your network through [SSA's EN directory](#).
- Community outreach is also boosted through the engagement of community disability service and advocacy organizations.

## Challenge - Business engagement to support employment outcomes

This is where there are benefits to operating in an aligned AJC.

### ***Solution***

- Working closely with the AJC business specialists to provide connections with the range of employment opportunities, as well as inside knowledge on which businesses have a focus on increasing employment of individuals in diverse populations to meet business priorities.
- These connections also put your disability experts in a position to support businesses directly in their employment of individuals with disabilities.
- This can also open up opportunities to participate in hiring events such as job / career fairs.



## Promising Practices

### ***Dedicated Point of Contact***

- Establish a key EN “Point of Contact,” who is a dedicated individual with disability expertise and customer service focus to support the connections with available programs and expertise in the AJC, as well as to manage administrative requirements for EN activity.

### ***Effective Strategies***

- Use of the Integrated Resource Team as a strategy to engage expertise from multiple programs at the same time in support of Ticket holders.
- List EN in the Ticket program EN Directory.
- Networking with other workforce ENs - benefits of consulting with other ENs in planning and implementation, and support from SSA’s Ticket Program Manager.
- Make sure that the AJC is the best fit for the Ticket holder.
- Provide benefits counseling/advisement and support with regard to financial capability.

### ***Capacity Building***

- Using Ticket income to build system capacity.
- Have a growth mindset with regard to business plan – look at how you can implement initially with existing resources and then support added capacity as Ticket income is generated and can be invested.
- Engage in a two-pronged outreach strategy – to community and with organizations that specialize in serving various disability groups.
- Use EN outcome payments as an indicator of success and showing impact.

### ***Service Alignment and Integration***

- Emphasis on AJC as a true one-stop where all programs are included in serving people with disabilities.
- Connecting customers to services of all AJC and important community programs.
- Ongoing system (programs in AJC and key community programs) engagement to build alignment.
- Develop a strategy supporting “co-enrollment” in multiple programs (several noted using a strategy like Integrated Resource Teams).
- Participate in community events held by AJC/workforce including youth focused meetings.

### ***EN Models***

- Work with an Administrative EN to support the administrative requirements to focus on assignment and service, as well as the technical support provided to EN operation.

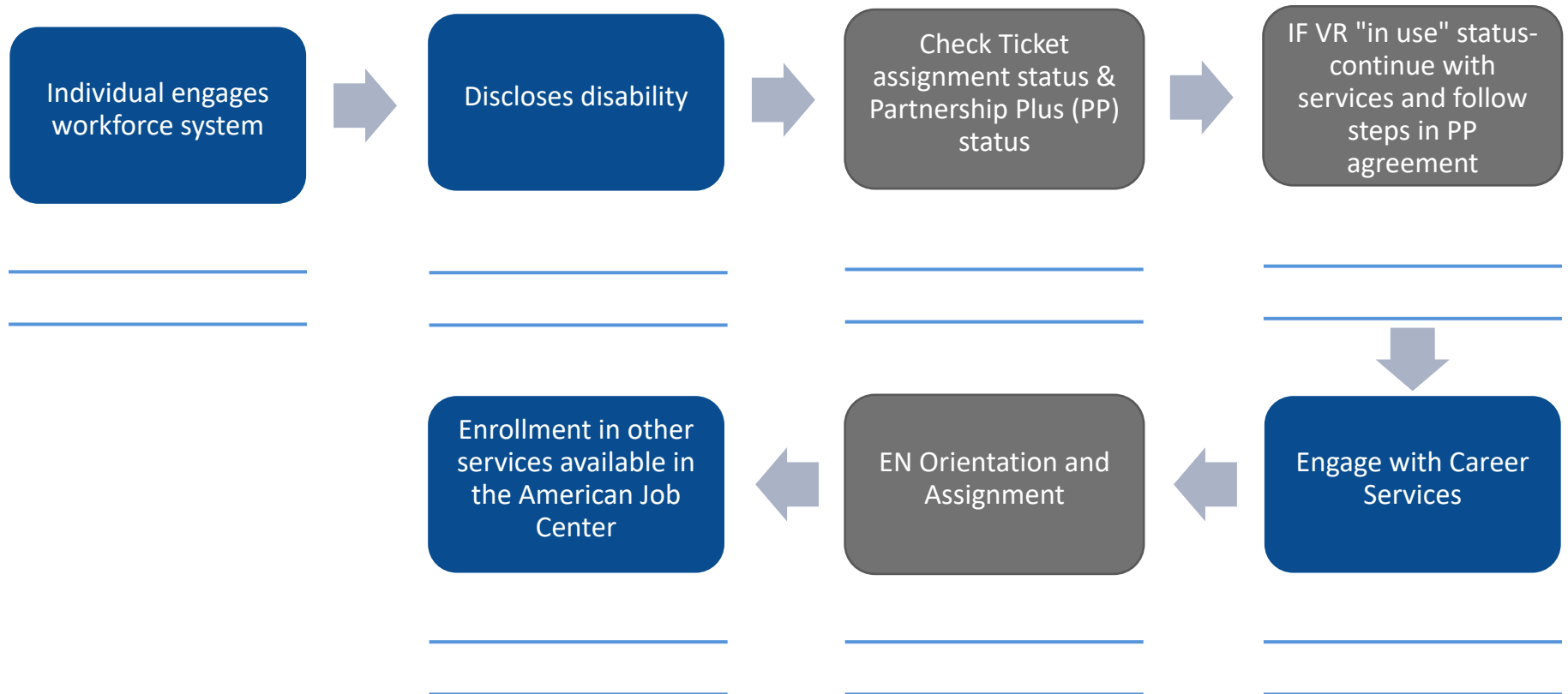
## **Appendices**

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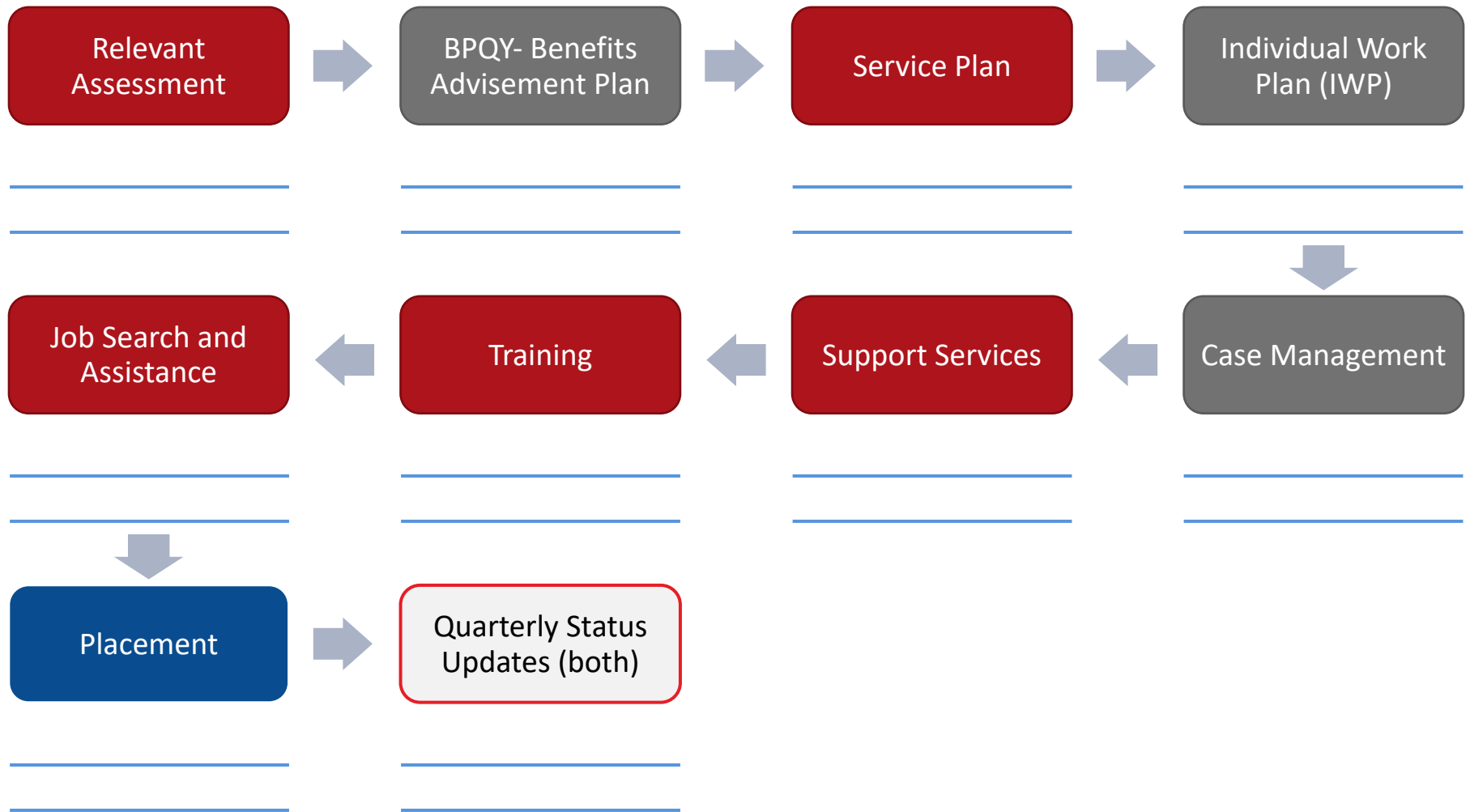
Appendix I: Desk Aid

## American Job Center Service Engagement

There are two service flow charts reflected below. The first reflects the initial engagement of job seekers in the American Job Center, and the second reflects job seekers in programs providing case management level services. The gray boxes reflect EN related activity that is aligned in these AJC service flows, with space to identify the individuals or teams responsible for each activity. ([Return to main document.](#))



## Program Services





## Appendix II: Acronym Guide

The following table provides descriptions of acronyms that are featured within the body of the Workforce EN Planning Guide and Workbook. Reference this list as needed as you become familiar with these terms.

Acronym Key	Acronym Description
<b>AJC</b>	American Job Center (also known as One-Stop Center)
<b>AEN</b>	Administrative Employment Network
<b>APOR</b>	Annual Performance Outcome Report
<b>CDR</b>	Continuing Disability Review
<b>COS</b>	Certification of Services
<b>CRP</b>	Community Rehabilitation Provider
<b>CWIC</b>	Certified Work Incentives Coordinator
<b>DOL</b>	Department of Labor
<b>EN</b>	Employment Network
<b>ETA</b>	Employment and Training Administration
<b>IEP</b>	Individual Employment Plan
<b>IWP</b>	Individual Work Plan
<b>LWDA</b>	Local Workforce Development Area
<b>LWDB</b>	Local Workforce Development Board
<b>MOU</b>	Memorandum of Understanding
<b>NESE</b>	Net Earnings from Self-Employment
<b>ODEP</b>	Office of Disability Employment Policy
<b>PII</b>	Personally Identifiable Information
<b>RFA</b>	Request for Application
<b>SGA</b>	Substantial Gainful Activity
<b>SSA</b>	Social Security Administration
<b>SSDI</b>	Social Security Disability Insurance
<b>SSI</b>	Supplemental Security Income
<b>SWA</b>	State Workforce Agency
<b>SWDB</b>	State Workforce Development Board
<b>TPA</b>	Ticket Program Agreement
<b>TPM</b>	Ticket Program Manager
<b>TPR</b>	Timely Progress Review
<b>TtW</b>	Ticket to Work / Ticket program
<b>TWL</b>	Trial Work Level
<b>TWP</b>	Trial Work Period
<b>VR</b>	Vocational Rehabilitation
<b>WIOA</b>	Workforce Innovation and Opportunity Act

### Appendix III: Workforce EN Resource Directory

This appendix identifies and describes online resources that provide useful information and guidance regarding the development of a workforce EN. Links to each resource are also provided.

#### Compilations and Guidance

Online Resource	Description	Hyperlink
Disability and Employment CoP	Ten selected resources designed to support AJCs in becoming and operating as ENs.	<a href="#">EN Tools and Resources</a>
SSA Ticket Portal – Service Providers	There are several resources available to service providers as they work with beneficiaries.	<a href="#">SSA Resource Documents</a>
SSA Ticket to Work	Main directory to Ticket to Work resources.	<a href="#">Ticket to Work Website</a>
SSA Ticket Portal -- Beneficiaries	Information and resources on Ticket to Work directed to Ticket Holders (beneficiaries).	<a href="#">Choose Work</a>
SSA Work Site	Broad-based resource for beneficiaries and providers with information about Ticket to Work, guidance and resources - including where to find ENs and resources/programs by state.	<a href="#">Social Security Work Site</a>
SSA Request for Application	Guidance and form to become an Employment Network.	<a href="#">EN Request for Application</a>
Ticket EN Business Guide	Business guide documents suitability for EN Personnel. (Scroll down to “Program Resources” section.)	<a href="#">EN Security and Suitability</a>
Ticket Annual Performance Outcome Report	Program resources on Annual Performance Outcome Report (APOR). (Scroll down to “Program Resources” section.)	<a href="#">APOR Training Presentation</a>
ETA Administrative Processes for Public Workforce ENs	To support the Department of Labor's goal to expand the capacity of the AJC network to serve persons receiving Social Security disability benefits, this Training and Employment Notice notifies the workforce system about the Ticket program's new administrative processes for public workforce ENs.	<a href="#">Workforce EN Guidance</a>
DOL Section 188 Disability Reference Guide	This Guide provides updated information and technical assistance that can help AJCs and their partners in the workforce development system meet the nondiscrimination and equal opportunity requirements for individuals with disabilities in Section 188 of WIOA.	<a href="#">Promising Practices in Achieving Nondiscrimination and Equal Opportunity</a>
Workforce Individual Work Plan (IWP)	SSA approved IWP to support workforce ENs in working with Ticket Holders. (Number 6 on this web page provides an “example” of a completed IWP).	<a href="#">Example –Workforce EN IWP</a>

**Guides, Fact Sheets, and Tools**

Online Resource	Description	Hyperlink
EN Ticket Assessment Guide	This resource is designed to help understand how to evaluate potential beneficiaries who are appropriate to assign Tickets (second resource)	<a href="#">EN Ticket Assessment Guide</a>
SSA Timely Progress	Outline of Timely Progress Guidelines which must be met annually by Ticket holders in order to retain medical Continuing Disability Review protection.	<a href="#">Timely Progress Guidelines</a>
SSA EN Options	SSA resource highlighting different EN options and models.	<a href="#">EN Options and Models</a>
Manual Ticket to Work Transactions	Guidance for completing manual transactions (e.g., assignment, requesting payments, checking payment status, etc.). (Scroll down to “Program Resources” section)	<a href="#">Manual Ticket Transactions</a>
SSA Goals of the Ticket program for beneficiaries	Guidance for ENs on information they should relay to Ticket Holder prior to IWP development to ensure understanding of program.	<a href="#">Informing beneficiaries of the goals of the Ticket program</a>
SSA Ticket Payments	Information to support understanding of how Ticket payments are made. (Scroll down to “Payments Resources” section)	<a href="#">Guide to Ticket Payments</a>
Ticket Payments	Rates for Ticket payments for current and previous years. (Scroll down to “Payments Resources” section)	<a href="#">Ticket Payments at a Glance</a>
Partnership Plus	An example of the flow of activity and Ticket assignment for a Partnership Plus Ticket Holder. (Scroll down to “Partnership Plus Resources” section)	<a href="#">How Partnership Plus works</a>
Ticket Program	Resource page that includes five ways to learn about Ticket to Work including providing an introduction; exploring the path to work; access to Ticket to Work tutorials, WISE webinars, and Ticket to Work help line.	<a href="#">Getting started with the Ticket Program</a>
Ticket to Work Program: An Aligned Mission to WIOA	ETA moderated webinar providing a broad overview of the Ticket Program with field examples.	<a href="#">Webinar archive and supporting resources</a>
Ticket Tools for Success	Tool which supports an EN in determining payment potential with Ticket holder assignment - based on previous income. (Scroll down to “Tools for Success” section)	<a href="#">18-month Look Back Tool</a>
Ticket Tools for Success	Tool for tracking income to support EN payment requests. (Scroll down to “Tools for Success” section)	<a href="#">Monthly Earnings Estimator</a>
Ticket to Work and Youth	Resources to assist youth in planning for their transition to adulthood as it pertains to Ticket to Work.	<a href="#">Ticket to Work and Transitioning to Adulthood</a>

***National Ticket Training and Resource Centers***

Online Resource	Description	Hyperlink
<b>Ticket Resources for Service Providers</b>	Resources for service providers that includes Social Security contacts, forms and documents, service provider outreach toolkit, Ticket terms A-Z and more.	<a href="#">Helpful resources for Service Providers</a>
<b>National Employment Network Association (NENA)</b>	Organization providing resources and professional affiliation opportunities for those professionals engaged in Ticket to Work activity.	<a href="#">NENA resources and information</a>
<b>Course: Disability and Employment Support Practices</b>	Online Course to become credentialed as a work incentive practitioner.	<a href="#">Certification for Benefits Planners</a>
<b>Work Incentives Planning and Assistance (WIPA) National Center</b>	The Virginia Commonwealth University National Training and Data Center provides comprehensive training and technical assistance to WIPA projects, the Ticket to Work Help Line, and community partners to ensure accurate and timely support for beneficiaries on the road to employment and financial independence.	<a href="#">WIPA National Training and Data Center</a>

**Appendix IV: EN Readiness Checklist**

The following checklist will support your discussion regarding the impact the EN can have on the capacity of the AJC to serve job seekers with disabilities. As you complete the EN Readiness Checklist Activities in this guide, record the scores you identify for each checklist item in the **Status** column. When you have addressed all items in the checklist, calculate your total score and use the **Scoring Rubric** to determine your readiness. ([Return to main document.](#))

EN Readiness Item	Status
<b>1</b> <a href="#">Customer Service Alignment of Core, Required and Other Programs</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>2</b> <a href="#">Determination of EN Model</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>3</b> <a href="#">Local/State Plan Priority for Inclusion of People with Disabilities in AJC services</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>4</b> <a href="#">Plan for Section 188 - Programmatic Access in American Job Center</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>5</b> <a href="#">EN Leadership and Program(s) that will provide oversight is/are established (including VR)</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>6</b> <a href="#">Determination of Fiscal Agent</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>7</b> <a href="#">Suitability Clearance</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>8</b> <a href="#">Application Status</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>9</b> <a href="#">Partnership Plus Agreement with VR</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>10</b> <a href="#">Benefits Advisement / Counseling / Planning</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>11</b> <a href="#">Financial Capability / Coaching</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>12</b> <a href="#">EN Evaluation Plan</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>13</b> <a href="#">Growth Plan for AJC with Ticket to Work Resources</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>14</b> <a href="#">Reporting Responsibility</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>15</b> <a href="#">EN Operation Plan</a>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/>
<b>Total Score</b>	

**Scoring Rubric**

- **51 to 75:** If 1, 5, 6, 7 and 15 are scored “5”, your workforce system is in good shape for implementation. Not all items are required or even necessary for EN operation, but beneficial in improving system capacity in serving individuals with disabilities.
- **41 to 50:** Again, if 1, 5, 6, 7 and 15 are scored “5”, your workforce EN can operate, but it is strongly suggested that leadership reviews areas where responses are lower than “4” in order to improve the likelihood of desired outcomes.
- **25 to 40:** It is suggested that the system establishes a work group to develop a plan to address priority areas identified in the checklist to improve, before operating as a Workforce EN.
- **24 and under:** This Technical Guide should be very useful for you, and we suggest consulting with successful workforce ENs in developing your work plan for operation.
- EN is not operational if items 1, 5, 6, 7 and 15 are not scored “5”.

Appendix V: AJC Customer Service Alignment

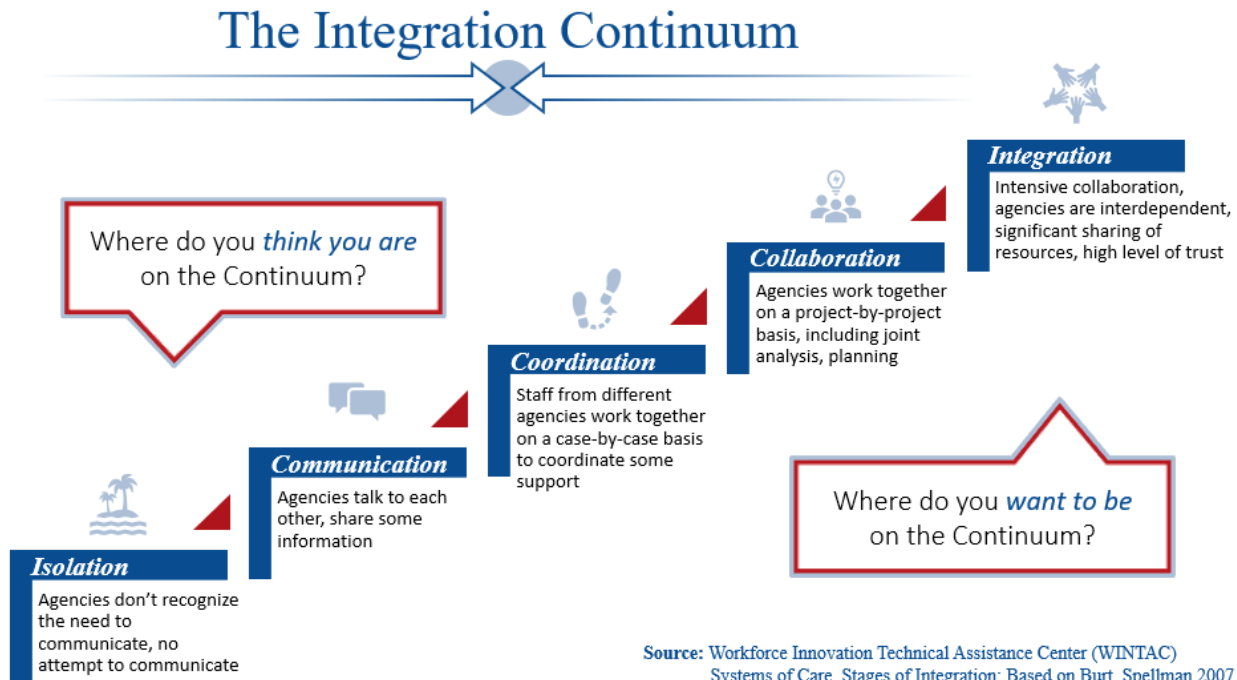
### American Job Center Alignment Activity



As you consider the Integration Continuum structure as indicated in the graphic below, identify how the programs in your American Job Center align in providing service to all customers. [\(Return to main document.\)](#)

- Isolation       Communication       Coordination       Collaboration       Integration

#### The Integration Continuum



	Isolation	Communication	Coordination	Collaboration	Integration
<b>Definition</b>	No exchange of information	Exchanging information for mutual benefit, <b>without altering activities</b>	Exchanging information for mutual benefit, and altering activities to achieve a common purpose – <b>oftentimes on a case by case basis</b>	Exchanging information for mutual benefit, and altering activities and sharing resources to achieve a <b>common purpose</b>	Exchanging information for mutual benefit, and altering activities, sharing resources, and <b>enhancing the capacity of the system</b> to achieve a common purpose
<b>Characteristics</b>	No time commitments, no trust, and turf or information issues	<b>Minimal time</b> commitments, <b>limited levels of trust</b> , and no necessity to share turf; information exchange is the primary focus	<b>Moderate time</b> commitments, <b>moderate levels of trust</b> , and no necessity to share turf; making access to services or resources more user-friendly is the primary focus	<b>Substantial time</b> commitments, <b>high levels of trust</b> , and <b>significant access to each other’s turf</b> ; sharing of resources to achieve a common purpose is the primary focus	<b>Extensive time</b> commitments, very high levels of trust and <b>extensive areas of common turf</b> ; enhancing each other’s capacity to achieve a common purpose is the primary focus
<b>Resources</b>	No sharing of resources	No mutual sharing of necessary	No or minimal sharing of resources- perhaps on a case-by-case basis	Moderate to extensive mutual sharing of resources and some sharing of risks, responsibilities, and rewards	Extensive sharing of resources, and full sharing of risks, responsibilities and rewards

### Appendix VI: Leadership Discussion Guide

The Leadership Discussion guide presents 27 questions that explore operational, growth planning and investment, and the organizations involved in the development of an EN. Read each question carefully and provide your response. ([Return to main document.](#))

#### ***Commitment***

1. Who is initiating the process to become an EN?
  - a. Local Program operating on behalf of the workforce system
  - b. LWDB
  - c. State Workforce Agency
2. Does the respective leadership (i.e. management or workforce board) endorse the goal of becoming an EN?
3. What is the intent of becoming an EN? Check all that apply.
  - a. Flexible funding
  - b. Improve system services for All job seekers.
  - c. Improve system services for job seekers with disabilities.
  - d. Improve system services for job seekers with more significant disabilities.
  - e. Improve services of an EN as a separate program within the AJC.
  - f. Improve services for job seekers that assign their Tickets
  - g. Other (please describe)
4. What will the EN funds be used to support?
5. How will this commitment to the EN operation continue if a change in leadership or administration occurs?
6. Have you researched the potential of EN activity?
  - a. Number of beneficiaries per service location
  - b. Number of current customers who are beneficiaries (this can be done with SSA's Ticket Program Manager prior to becoming an EN).
7. Is a realistic time frame or a contingency plan in place for a scenario in which the EN does not produce predicted results?

#### ***Demonstrated Investment***

8. Has the workforce or AJC leadership developed policy or procedures on serving job seekers with disabilities? If so, does or will this policy include language about EN operations? Will leadership permit time for training workforce staff about operation as an EN?
9. Will the leadership engage the IT department to be involved in discussion on how management information systems (MIS) can support EN operations and required reporting? Will the related data needs for the EN operation receive equal priority as other projects?
10. Will the communications department promote EN operation in future printed materials, on the website, etc.?
11. Is the fiscal department prepared to adjust recording of a revenue sources that is not tied to a program but to Ticket program funds?



### ***Local Investment***

- 12.** Are all programs involved in EN oversight and implementation (including EN operation plan development and implementation)?
  - a. If not, has a plan been developed to inform and engage all program managers and services professional in EN activity?
- 13.** Will program managers support promotion of the EN and be engaged in local marketing?

### ***Discussion/ Coordination with Vocational Rehabilitation***

- 14.** Has the state VR agency been included in the discussion of the idea from the beginning?
- 15.** Has discussion with VR personnel addressed referrals and strategies identified on how to best serve the customers who are beneficiaries by placing the customer as the primary focus to avoid a sense of competition?
  - a. If yes, have key points of contact been established between the VR planning activity and the EN operation to maintain ongoing communication and support coordination in assignment and service provision?
- 16.** Is a Partnership Plus agreement in place or in process of development?
- 17.** Has a plan been developed for this Partnership Plus agreement to be explained to local VR supervisors if not already knowledgeable about the Partnership Plus/ counselors?

### ***Infrastructure***

- 18.** How will employment services and supports be provided to a Ticket holder? Will the Ticket holder be:
  - a. Engaged in the same AJC services available to all job seekers?
  - b. Supported by services available only to individuals that assign their Ticket?
  - c. A combination of the above?
- 19.** Has a plan been developed to determine who will conduct administrative duties related to the EN?
- 20.** What management information system will be used to assist in creating and maintaining required EN information?
- 21.** Is there a marketing plan developed for the EN?
- 22.** What is the plan to track payments and distribution of EN funds?
- 23.** For the state EN model, has the state determined an EN Coordinator or someone who will be a lead person for the EN?

### ***Procedures***

- 24.** Once the above areas are addressed, what is the plan on how the information will be communicated initially?
- 25.** What is the plan to collect and share information on a routine basis for purposes of the quarterly report or an annual report?
- 26.** What is the plan or guidance on how the EN funds will be used?
- 27.** How or who will be responsible to assure the EN activities remain intact if there is a change in personnel?

Appendix VII: How does your EN align with the AJC?

## Employment Network and American Job Center

Review the examples of EN alignment with American Job Centers below. Determine how you envision your EN aligning with the AJC.

[\(Return to main document.\)](#)

### Integration Continuum Major Processes

Isolation	Communication	Coordination	Collaboration	Integration
The EN operates as a separate service program within the AJC.	The EN operates as a separate service program within the AJC.	The EN operates as a separate service program within the AJC.	The EN operates as a separate service program within the AJC, but customer service is addressed from a “system” perspective in alignment in terms of customer experience.	EN activity is integrated into the job seeker services that all customers receive as they are served in the AJC. There is a “common intake” and “shared case management” approach in service delivery. AJC services, identified as functional as opposed to by agency. Those specific to the support needs of SSA disability beneficiaries (e.g., financial advisement, discovery) are a natural part of the overall system.
The EN conducts its own customer outreach, has its own case managers and/or employment specialists, provides its support and placement services separate from all other programs operating in the AJC	Share written material between staff of the Core, Required and “other” (including the EN), outlined role and services provided.	Develop joint brochure/flier that identifies all partner agencies in the AJC and the services they provide.	There is an effective “Partnership Plus” agreement and the process of ticket assignment and partnership is clear and understood by the LWDB and all AJC programs.	Focus is on engagement of expertise as needed in common customer service delivery as opposed to making referrals.
EN staff provide EN services to EN customers.	Share contact information of a representative from each agency.	Agency orientations and intake processes are separate but coordinated to maximize customer flow of service. This may include the timing, sequence of orientations and triage processes of customers being referred to other agency orientation and/or intake processes. Connections with other programs are made on a “referral” basis.	Partners may establish a central contact point at the AJC that can connect customers to each of the separate partner agencies. This central contact point may be integral to the engagement of individuals in activity that support the TtW operation in the AJC. Partner	Any staff of programs operating in and through the AJC may provide services that support the EN operation.

## Ticket to Work: Operating a Workforce EN

Isolation	Communication	Coordination	Collaboration	Integration
			expertise is generated through direct engagement in service	
From the LWDB perspective, the EN reflects the activity of a separate program or agency. As a separate “program” it operates its own budget and makes own decisions on expending ticket income.	Engagement of Ticket Holders with the expertise of other programs is completed through referrals. EN staff provide EN services to EN customers.	EN staff provide EN services to EN customers. Develop joint brochure/flier that identifies all partner agencies in the AJC and the services they provide.	Together, the AJC agencies promote and host AJC resources in the community and relevant service supports for job seekers who are on SSA disability benefits who seek to achieve financial self-sufficiency through career growth.	Resources established through EN funds, such as benefits advisement, system navigation or disability resource coordination, assistive technology are freely available to all AJC job seekers.
Successful EN Operation has minimal to no recognized impact on performance of other programs operating in the AJC.	LWDB and/or single agency makes all budget and spending decisions with no input from other programs. This is “program income” with program ownership.	LWDB and/or single agency may invite input from other programs or community but retain sole decision-making role in investing ticket income.	Resources established through EN funds, such as benefits advisement, system navigation or disability resource coordination, assistive technology are freely available to all AJC job seekers.  The expertise of all AJC programs is included in the oversight of the EN operation, including decisions on investment of resources generated by the EN activity.	LWDB may have established subcommittee to board or other working group to combine expertise and perception make decisions customer services and how all programs are engaged or aligned and share the role in decisions on ticket fund investments into the system.
	Benefit of EN operation for other AJC programs is incidental in that there is another program operating in the AJC that can respond to job seekers enrolled in other programs that are SSA disability beneficiaries.	Consideration of how other program services complement EN activity in determining service needs to address with investments. All AJC programs support ticket assignment for those beneficiaries they have enrolled and increase their outcomes as a result.		As a part of the decision making process in ticket investments, all AJC programs strengthen employment outcomes for individuals with disabilities that they serve (whether ticket is assigned to EN or not).

Appendix VIII: Staff Assignment, Qualifications and Training Activity

**Activity: Staff Assignment, Qualifications, and Training**

**This activity leads with a partial example and is followed by the activity.** The Pleasant Valley Local Workforce Development Board has a Disability One-Stop Committee facilitated by the one stop operator. The Disability Committee has selected Goodwill Industries (one of the one-stop partner programs) to be the EN fiscal agent and operate the EN under the direction of the Disability Committee (includes all MOU signatory agencies). The EN growth plan projects establishing a “navigator” (point of contact) on a part-time basis the third year, who will also be trained as a benefits planner/advisor. Over time, the navigator role will be expanded to full-time – along with the benefits advisement role (spread across two positions when the Ticket Income can support it). Functionally, the navigator will serve in the key role of EN operation. Until the budget can sustain these roles, leadership will support AJC staff in the EN functions of the service flow, with the one-stop operator and Goodwill Field Operations Chief handling the administrative part of the operation. [\(Return to main document.\)](#)

Service Flow	Staff person assigned	(a) Role exists in this Workforce EN operation?	(b) Operational knowledge needed	(c) Training required	How often?
<b>AJC ENGAGEMENT</b>					
<b>EN Discussion and Assignment</b> AJC Services <ul style="list-style-type: none"> <li>• Basic assessment</li> <li>• Career counseling</li> <li>• Basic workshops</li> <li>• LMI</li> <li>• Career Pathways</li> <li>• Job Referral</li> </ul>	EN Point of Contact	(3 <sup>rd</sup> year – with Ticket funding)	<ul style="list-style-type: none"> <li>○ Services and contacts with all AJC programs</li> <li>○ Ticket Assignment and IWP and case Management processes</li> <li>○ Background on disability benefits and employment</li> </ul>	<ul style="list-style-type: none"> <li>○ One-Stop Operator overview and introductions/participation in weekly staff meetings</li> <li>○ AJC Annual Section 188 training</li> <li>○ SSA TtW training modules</li> <li>○ Security Awareness Training</li> <li>○ Benefit Liaison Training with BL network</li> </ul>	<ul style="list-style-type: none"> <li>○ At initiation and ongoing with meetings</li> <li>○ Annually</li> <li>○ At initiation</li> <li>○ Annually</li> <li>○ At initiation</li> </ul>
	AJC Staff	Yes – Career Services team in Resource Area with support from One-Stop Operator and Goodwill Field Service Coordinator	<ul style="list-style-type: none"> <li>○ Services and contacts with all AJC programs</li> <li>○ Ticket Assignment and IWP and case Management processes</li> <li>○ Background on disability benefits and employment</li> </ul>	<ul style="list-style-type: none"> <li>○ One-Stop Operator overview and introductions/participation in weekly staff meetings</li> <li>○ AJC Annual Section 188 training</li> <li>○ SSA TtW training modules</li> <li>○ Security Awareness Training</li> <li>○ Benefit Liaison Training with BL network</li> </ul>	<ul style="list-style-type: none"> <li>○ At initiation and ongoing with Meetings</li> <li>○ Annually</li> <li>○ At initiation</li> <li>○ Annually</li> <li>○ At initiation</li> </ul>



Activity: Considering the service flow in the desk aid, the functions relevant to the EN activity within the AJC will require a specific understanding in order to fulfill responsibilities in the EN’s operational plan. Based on the modified example shared above, complete the chart below to outline a) how the EN specific functions are addressed in your AJC; b) the expertise required to fulfill that role, and c) how the expertise will be developed and supported.

Service Flow	Staff person assigned	(a) Role exists in this Workforce EN operation?	(b) Operational knowledge needed	(c) Training required	How often
<b>AJC ENGAGEMENT</b>					
<b>EN Discussion and Assignment</b> AJC Services <ul style="list-style-type: none"> <li>• Basic assessment</li> <li>• Career counseling</li> <li>• Basic workshops</li> <li>• LMI</li> <li>• Career Pathways</li> <li>• Job Referral</li> </ul>	EN Point of Contact				
	AJC Staff				
	Other Program Staff				
<b>PROGRAM AND SUPPORT SERVICES</b>					
<b>IWP Case Management</b> AJC Program Services <ul style="list-style-type: none"> <li>• Career Counseling</li> <li>• Training/ Upskilling</li> <li>• Job Search and Assistance</li> </ul>	EN Point of Contact				
	AJC Staff				
	Other				
<b>Benefits Advisement</b>	Benefits Advisor				
<b>POST-EMPLOYMENT</b>					

Service Flow	Staff person assigned	(a) Role exists in this Workforce EN operation?	(b) Operational knowledge needed	(c) Training required	How often
<b>Quarterly Status Updates</b>	EN Point of Contact				
	AJC Staff				
	Other				
<b>Benefits Advisement</b>	Benefits Advisor				
<b>ADMINISTRATIVE</b>					
<b>SSA Portal</b> <ul style="list-style-type: none"> <li>• Checking availability</li> <li>• Assignments</li> <li>• Payments</li> </ul> <b>Progress Tracking Reporting</b>	EN Point of Contact				
	AJC Staff				
	Other				

## Appendix IX: Integrated Resource Team Activity

*The following five scenarios feature Ticket to Work customers. Read each scenario carefully. Then, use the chart below to identify which services could play an important role in helping that customer achieve employment success. Services can be listed more than once in each scenario and it is ok to not use every service with each customer. [\(Return to main document.\)](#)*

Services	Services
WIOA Title 1	WIPA/Work Incentives
Vocational Rehabilitation	Business Services
Adult Education	Veterans Services
Community College Advisor	Mental Health Services
Community College Disability Services	Addiction Services
Community College Internship and Career Office	Court Services (Parole, Probation, Drug Court)
TANF	Transportation Assistance
WIOA Youth Services	Job Coaching/ Supported Employment Services
Legal Aid	Financial Literacy Program
Pre-Apprenticeship & Apprenticeship Advisor/ Coordinator	Employers
Work Based Learning Program	Independent Living Center
Deaf and Hard of Hearing Services	Family/ Friends
Development Disabilities Services	Other

### Scenario #1 - Janine

Janine is a 36-year-old single mother of two receiving SSDI and has a high school diploma. Janine was loyal to her former employer having worked at the supermarket for eleven years making it her first and only job. She started as a cashier and was promoted to supervisor. For the past four years, Janine has been out of work due to having children and issues related to chronic illness. She was diagnosed with lupus and experiences extreme fatigue, painful joint flare ups, particularly in her hands and fingers, and occasional bacterial infections. She is being treated for depression. Even though Janine is receiving treatment, she still has flare ups that make it near impossible to function. Sometimes she can sense a flare up coming on but not always. She will need a job with flexible hours and one where she will not need to be on her feet most of the day. Ideally, she would prefer to work remotely from home.

Janine's two children are about to attend school full time, and she is hoping to find work immediately, but is also interested in a career where she can earn living wage as she reports having a difficult time making ends meet on her monthly TANF and SSDI. Janine says she's good with numbers and math was her favorite subject. She has good problem-solving skills and has learned how to think outside the box. She is interested in becoming certified in Medical Billing & Coding as many in that field work remotely.

**Who should be members of Janine’s Integrated Resource Team?**


**Scenario #2 - Darius**

Darius is a 24-year-old single father of 2 boys who has been receiving SSDI for the past two years. His children’s mother is not in the picture and he and his sons currently live with Darius’ mother. Darius dropped out of high school at 17 and has held down various minimum wage jobs. Darius has been treated for Bipolar Disorder since he was 16. He had a severe setback a few years back and was hospitalized several times making him unable to work for over three years. About three months ago, he began working part-time as a sales attendant for a big box electronics store. He reports today that he is in stable condition and that his current treatment regimen is working well.

Along with Bipolar Disorder, Darius has multiple learning disabilities, including ADHD and reading comprehension. Poor grades, low literacy skills, and trouble staying focused are reasons why he dropped out of high school. Darius’ mother indicated he has “street smarts,” is highly emotionally intelligent, making him good at connecting with people. In addition, Darius has a strong interest in technology and computers. In his free time, Darius enjoys taking apart old computers and fixing them. Darius does not like sitting still and finds boredom to be the biggest trigger for his mental illness.

Darius likes working for his current employer and would like to move up to the technical support department. He would need to get his high school equivalency, and a certificate in Information Technology (IT). He feels it impossible, since he struggled in school, and cannot stop working since his income supports both his mom and children. Because of his disability, Darius is concerned about maintaining full-time employment and transitioning off of SSDI. He relies on Medicare for medications and therapy. Darius’ local school district has a new online adult education program that could work for his schedule and childcare needs. He is hoping to work with a tutor to help prep for the GED. Once he passes, Darius would like to get his IT certificate from the local community college. He’s hoping to take just two classes at a time so that it won’t interfere with his schedule. Darius’ employer informed him that if he wants, he could complete his required internship at his current place of employment.

**Who should be members of Darius’ Integrated Resource Team?**


**Scenario #3 - Melody**

Melody has an intellectual/developmental disability and Generalized Anxiety Disorder and mild OCD. She relies on public transportation or her parents for transportation because she is unable to pass driver’s education. She receives SSI benefits and has Medicaid. She does have a high school certificate of



completion. Post high school, she entered a transition program that provided several paid and unpaid work-based learning opportunities. She had to exit from the program when she turned 22. She has been unable to find a job on her own despite completing multiple applications.

Melody needs a job she can either walk to or take the bus. She cannot work nights, as her family doesn't want her traveling alone. She likes cleaning and being tidy. Melody would like to work as a housekeeper like her mother, but her mom's company requires employees have a driver's license. Her work-based learning assessments showed she works best independently with clear and specific instructions. Further, Melody cannot work in a position where she is rushed or feels "pressure" as it exacerbates her anxiety. Melody needs help finding a job able to accommodate her needs. She asked if there's a way she can "try out" a job to see if she likes it. Her parents mentioned Melody worked well at the transition program because she had job coaches. Melody would like to someday work full-time, and not rely on benefits. She would also like to someday get a place of her own and move out of her parents' home.

***Who should be members of Melody's Integrated Resource Team?***


**Scenario #4 - Christopher**

Christopher, an SSDI recipient, is 48 with a bachelor's degree in Biology. He has 18 years' experience in an optometry clinic as a lab technician. About five years ago, he entered residential treatment to address alcohol addiction. While in treatment, he learned he has Autism Spectrum Disorder. For the next few years, Christopher found himself in and out of treatment unable to hold a job. Over this past year, he appeared to be in a better place, with his medication and therapy. He wants to venture back into the workforce and has a better understanding of his needs. He reports he wants a job that utilizes his education and experience, but also requires limited patient/customer contact to not trigger anxiety or additional stress. To assist a new career path, Christopher participated in informational interviews set up by his VR counselor. After the interviews along with labor market research, he is interested to be certified as a Surgical Technician and learned a local hospital has partnered with a local college providing Registered Apprenticeships in this area.

Christopher knows that he will need to continue his mental health treatment (e.g., medication, weekly therapy appointments, regular AA meetings, and access to his sponsor). He lives in a sober living home that provides strong supports and a routine, which he is expected to exit and move into his own place in about six months. Christopher is concerned how this change will affect his health and sobriety especially if returning back to work. He also reports some financial concerns. One, Christopher is unsure how he will be able to afford a place on his own. Two, his driver's license is currently suspended, and is having trouble understanding what he needs to do in order to legally drive again. Further, he is paying Social Security \$200 a month as a result of an issue with overpayments. This time around, Christopher wants to make sure he wisely transitions off of benefits without impacting his medical care.

**Who should be members of Christopher’s Integrated Resource Team?**


**Scenario #5 - Freddie**

Freddie, 22 years old, was born Deaf and uses American Sign Language (ASL) and can partially read lips. He attended a boarding high school for the Deaf and went to the National Technical Institute for the Deaf for college for three semesters as an undecided major. He dropped out because he had a hard time following through with coursework and struggled with remembering information. Freddie lives with his parents and younger sister. His father is also Deaf, and mom and sister are hearing. All family members communicate using ASL. While in college, Freddie got a job in the cafeteria and found cooking to be a passion for him. He now would like to pursue culinary arts. Upon moving back home, Freddie tried for months to get a restaurant job. He went on several interviews but was not successful in finding work.

He learned about an eight-week culinary course and kitchen training program through his American Job Center. This program teaches basic kitchen skills and upon completion, he can take the ServSafe exam for Food Handlers and Management. Nearly everyone who has completed this course has secured employment. He would need to have ASL interpreters for the entirety of the culinary program. He will likely need some assistance in finding a restaurant willing to hire him and have an interpreter with him until he is trained on the job. Freddie is open to a work-based learning or on-the-job training situation.

**Who should be members of Freddie’s Integrated Resource Team?**


## Suggested Answers Integrated Resource Team (IRT) Activity

**Janine's IRT**

Services	Services
TANF	Community College Disability Services
WIOA Title I	Business Services
Vocational Rehabilitation	Mental Health Services
Community College Advisor	WIPA/Work Incentives/Coordinator

**Darius' IRT**

Services	Services
WIOA Title I	Community College Disability Services
Vocational Rehabilitation	Employer
Adult Education	Family
Mental Health Services	Work Based Learning Programs
WIPA/ Work Incentives Counseling	Business Services
Community College Advisor	

**Melody's IRT**

Services	Services
WIOA Youth Services	Independent Living Center
Vocational Rehabilitation	Transportation Assistance
Developmental Disabilities Services	Family
Work Based Learning Programs	WIPA/ Work Incentives Counseling
Job Coaching/ Supported Employment	

**Christopher's IRT**

Services	Services
WIOA Title I	Legal Aid
Vocational Rehabilitation	Apprenticeship Advisor
Mental Health Services	Transportation Assistance
Addiction Services	Financial Literacy Program
WIPA/ Work Incentives Counseling	HUD/ Housing Programs

**Freddie's IRT**

Services	Services
WIOA Title I	Deaf & Hard of Hearing Services
Vocational Rehabilitation	Friends/ Family
Work Based Learning	Employer
Business Services	Job Coaching/ Supported Employment
WIPA/ Work Incentives Counseling	

Appendix X: EN Evaluation Activity

## Employment Network Evaluation Activity



Identify the outputs and outcomes your team will select to identify ongoing review and improvement efforts for your EN. Possible outputs and outcomes are listed in the charts along with space to identify additional outputs and outcomes. You should only identify outputs and outcomes for which there is an identifiable method to capture data/ information for review.

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### System Outputs and Outcomes

Measure	Method of Tracking	Current Status	1 year objective	3-year objective
<b>Partnership Plus Assignments</b>				
<b>AJC or Core Program customers disclosing disability</b>				
<b>AJC or Core Program customers disclosing SSA benefits</b>				
<b>Customer disclosing disability experiencing positive employment outcomes (WIOA performance)</b>				
<b>Co-enrollments of individuals disclosing disability</b>				
<b>Co-enrollments of individual disclosing disability that experience positive employment outcomes (WIOA performance)</b>				
<b>Customer services available in the AJC that are supported by Ticket revenue</b>				
<b>Other</b>				
<b>Other</b>				

**EN Outcomes- Impact for Assigned Ticket Holders**

Measure	Method of Tracking	Current Status	1 year objective	3-year objective
# of Tickets Assigned				
Of those assigned, the # working				
# assigned that are co-enrolled				
# of assignments in outcome payment status				
# of those assigned that were terminated having completed full outcome payment schedule				
# total amount of Ticket income by year (indicates customer outcomes)				
Other				
Other				
Other				

## Appendix XI: Growth Plan Example

### ***Growth Planning Example: Shelton Corner LWDB***



It is suggested that workforce ENs develop a growth plan similar to this as a part of their overall operation plan. This will support the ability to determine how key functions might be supported within the system already in place, and which functions (including added roles and supports) can be supported with additional Ticket funding that is generated. Strong investments increase the likelihood of stronger ticket outcomes in the future. ([Return to main document.](#))

Shelton Corner LWDB is a rural area around the metro area of Shelton Corner and Lawton. The leadership team has identified a way in which it can provide Ticket related support to career and program services in the center at a level of .75 FTE through programs already operating in the AJC to engage job seekers in career and program services. As the EN grows, and income is generated, the leadership group will consider how to invest the income generated to increase the system's responsiveness to job seekers with disabilities. Income is projected based on 30 Ticket assignments and 15 placements a year. In consultation with SSA's Ticket Program Manager and a neighboring LWDB operating as an Employment Network, the Shelton Corner LWDB projected Ticket income in the chart below, with an initial plan for investment over time. This plan will be modified according to actual experience over time. Each year's projected operating budget will be the amount of ticket income generated the previous year.

- General population of area – 500,000
- Projected hypothetical number of Ticket holders – 20,000
- Staff commitment to EN activity - .75 FTE (through a combination of LWDB commitment with administration and training with customer service team staff in the AJC).
  - As revenue is generated, it can be used to increase the dedicated disability and EN subject matter expertise in customer services.
- Estimated Ticket assignments (beginning in second year): 30
- Estimated Ticket holders who obtain employment annually (beginning second year): 15
- Estimated Ticket holders who leave the program annually: 6
- Projected annual Ticket income:
  - YR 1 – \$0;
  - YR 2 – \$36,000
  - YR 3 –\$81,000
  - YR 4 - \$117,000
  - YR 5 - \$153,000

	Year 1		Year 2		Year 3		Year 4		Year 5	
	Who	Amount	Who	Amount	Who	Amount	Who	Amount	Who	Amount
<b>Annual Budget</b>						<b>36,000.</b>		<b>\$81,000</b>		<b>\$117,000</b>
<b>Admin/ Operation/ contract/ billing/ payments/ reporting</b>	One Stop Operator- Bob Goodwill- Beth	0	Bob, Beth	0	Beth (Goodwill becomes EN operator- 10% fee)	\$3,600.	Goodwill becomes operator/FA on behalf of system	\$8,100	Goodwill becomes operator/FA on behalf of system	\$11,700
<b>Customer Services (Navigator/ DRC)</b>	Training to AJC staff	0	Training to AJC staff	0	See below		Goodwill hire PT Nav/DRC 10 hrs/wk	\$8,000	Goodwill PT Nav/DRC- 20 hrs/wk	\$25,000
<b>Benefits Advisement</b>	WIPA	0	WIPA	0	WIPA – Goodwill hire Nav/BA PT 20hrs/wk – address customer service / navigator	\$30,000	Goodwill promotes to FT Nav/BA	\$52,000	Goodwill FT Nav/BA	\$55,000
<b>Flexible Funding Line</b>	N/A				Budget – for EN Leadership to address supports not otherwise provided	\$2,400.		\$2,900		\$10,000
<b>Assistive Tech/ Communications</b>	N/A						Video interpreting; transcriptions,	\$5,000		\$5,000

## Ticket to Work: Operating a Workforce EN

	Year 1		Year 2		Year 3		Year 4		Year 5	
	Who	Amount	Who	Amount	Who	Amount	Who	Amount	Who	Amount
							adaptive software, iPads			
<b>Public Awareness/ Outreach</b>	N/A						Community presentations on work, benefits and disability	\$2,500		\$2,500
<b>Business Services</b>	N/A						Working with AJC Business Team in Support to Businesses employing people with disabilities	\$2,500		\$2,500
<b>Board Support/ Staff Orientation and Training</b>	N/A								Support to Board for planning and oversight – and system wide professional training	\$5,300
<b>Total</b>		<b>\$0</b>		<b>\$0</b>		<b>\$36,000</b>		<b>\$81,000</b>		<b>\$117,000</b>



Appendix XII: EN Operation Plan

**Workforce Employment Network**

Local Area Operation Plan

- Local EN Model
  - Local Oversight Entity:
- State EN Model
  - State Oversight Entity (if applicable)
  - Local Oversight Entity (if completed locally)
- Administrative EN Model

	Section	Description
1	Outreach/ Intake/ Assignment	
2	Services	
3	Professional Staff <ul style="list-style-type: none"> <li>○ Qualifications</li> <li>○ Training/ Support</li> </ul>	
4	Partnership	
5	Key Support Services	
6	Evaluation/ Program Improvement	
7	Ticket Resources Investment/ Growth Plan <ul style="list-style-type: none"> <li>○ Vision for Sustainability</li> <li>○ Service provision and support at initiation</li> <li>○ Ideal additional service structure and costs to sustain</li> <li>○ Ticket revenue projection</li> <li>○ Budget plan</li> </ul>	

[\(Return to main document.\)](#)