

SRC Performance Review Committee
October 10, 2018 Minutes (approved 12/6/2018)

| Thursday, October 10, 2018 | | 10:00 am to 12:00 p.m. | | Conference Call via Skype | |
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| Meeting called by: | Committee members approved James Smith filling the role as meeting facilitator. Meeting was called to order by James at 10:00 a.m. | | | | |
| Members Present: | Sherrie Brunelle, Nick Caputo, Marlena Hughes (reappointment pending: joined the call at 10:10 a.m.), Chris Kane (left the call at 11:00 a.m.), Rose Lucenti, Deb Tucker Boyce | | | | |
| Members Absent: | Robin Ingenthron, Brian Smith. | | | | |
| SRC Liaison: | James Smith, VR Budget and Policy Manager. | | | | |
| SRC Coordinator: | Debra Kobus | | | | |
| Interpreters: | Not applicable. | | | | |
| Speakers / Presenters: | Not applicable. | | | | |
| Facilitator: | None | | | | |
| Guests: | None | | | | |
| 1) Introductions (James Smith). | | | | | |
| Discussion: | Those in attendance introduced themselves. Debra asked that since she cannot see people, that they identify themselves when speaking. | | | | |
| Conclusions: | Thanks everyone! | | | | |
| Action Items: | | Person Responsible: | | Deadline: | |
| None | | Not applicable | | Not applicable | |
| 2) Approval of Agenda (James Smith). | | | | | |
| Discussion: | James asked if there were any proposed changes or additions to the agenda. There were none. Rose Lucenti moved to approve the agenda as proposed and it was seconded. There was no discussion. Motion approved. Vote: 5-0-0. | | | | |
| Conclusions: | The agenda was approved. | | | | |
| Action Items: | | Person Responsible: | | Deadline: | |
| None | | Not applicable | | Not applicable | |
| 3) Open for Public Comment (James Smith). | | | | | |
| Discussion: | There was no one from the public present. | | | | |
| Conclusions: | None. | | | | |
| Action Items: | | Person Responsible: | | Deadline: | |
| None | | Not applicable | | Not applicable | |
| 4) Approval of Minutes June 7, 2018 (James Smith). | | | | | |
| Discussion: | James asked if there were any proposed changes to the minutes. There were none. Sherrie Brunelle moved to approve, and it was seconded. No further discussion. Vote approved 5-0-0. | | | | |
| Conclusions: | The June 7, 2018 minutes were approved. | | | | |

| Action Items: | Person Responsible: | Deadline: |
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| Upload approved minutes to www.VTSRC.org | Debra Kobus | 11/15/2018 |
| 5) Department of Labor Stats (Rose Lucenti). | | |
| Discussion: | <p>Rose reported that unfortunately she doesn't have all the data ready for this meeting as some of the data is not easily accessible right now so it is taking longer. In addition, Rose wanted to confirm what we are looking for in terms of the type of demographic data that she was to provide.</p> <p>Data on certifications (people achieving outcomes):</p> <p>Rose said she will be looking at the number of individuals involved in training that were eligible for services through the Department of Labor and will include what their certification is as well as the entity that provided the training. She confirmed that demographics should include age, gender, % with disabilities, those that are low income and receiving public assistance, and other relevant data.</p> <p>The data on youth would also include at risk factors such as offender status, homelessness, drug abuse, and the % of those with disabilities along with the programs that serve them.</p> <p>The data obtained from the Labor Exchange would reflect all the programs in the Workforce Development Division of the Department of Labor (DOL). The Labor Exchange provides basic information on those that are ages 13 and up and this data is available to the public. The Labor Exchange takes information provided by an employer that has one or more positions available (submitted via a job order) and enters it into our Job Link system where all the info on the employer and what they were looking for is kept.</p> <p>Individuals can look for employment under the Labor Exchange in Job Link regardless of age or employment status. We have Federal money that allows us to provide training under the WIOA. Based upon WIOA requirements, we focus primarily on youth that are out of school as 75% of the funding must be spent on out-of-school use with the remaining 25% allotted to in-school use.</p> <p>The Youth-Adult Program are for those that are 18 and older and provides training funds for individuals that are looking to increase self-efficiency. We also have Dislocated Worker Funds for those that are 18 plus and lost their job without any fault of their own so they need to be retrained. We also work with individuals receiving food stamps and partnering with VR and Economic Services help them obtain training or find employment. Training can include individual placement in job with the DOL paying the wage to allow for the consumer to experience the job to see if they are interested in it thus exposing them to different work opportunities. We also have Occupations Skills Training through CCV where a consumer could obtain the skills necessary to obtain a license, such as in nursing or any occupation that an individual is interested in. We would pay for some part or all the tuition. We also run the Apprenticeship Program and can assist with that as</p> | |

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| | <p>well. There is also on the Job Training Program where we find an employer looking for an employee and we would pay up to half of the hourly wage while they are in training.</p> <p>Sherrie asked if we could get any comparable data from VR and James said that we could depending upon what is requested. We do share a lot of folks with the DOL so this data would likely be included. How many consumers are being supported by VR and have DBVI cases would be interesting to obtain.</p> <p>ELL Stats (% of portion of population they are serving) Broken out by region the numbers of ELL – we do collect this, however, when they register with VT Job Links they ask that question but what I am finding is the total from October 1 – October 1 – only found 106 and that seems extremely low with largest in Burlington at 71 so she wants to do a bit more digging to see if those figures are accurate. Numbers were very low 4 in Newport, 0 in St. Johnsbury, etc.</p> | | |
| Conclusions: | Thank you Rose for the information and we are looking forward to looking at your deeper dive in December! | | |
| Action Items: | Person Responsible: | Deadline: | |
| <ul style="list-style-type: none"> • ELL Stats (% of portion of population they are serving). • Data on certifications (people achieving outcomes). | Rose Lucenti. | 12/6/2018 | |
| <p>Sherrie asked if we could get any comparable data that Rose is obtaining from the DOL from VR. James said that we can depending upon what is requested. We do share a lot of folks with the DOL. How many consumers are being supported by VR and DBVI cases would also be interesting to obtain.</p> | James Smith. | 12/6/2018 | |
| <p>6) Ticket to Work Deep Dive (James Smith) FULL POWERPOINT PRESENTATION AVAILABLE HERE: https://vtsrc.org/wp-content/uploads/2018/10/Ticket-to-Work-SRC-presentation-Oct-2018-FINAL-1.pdf .</p> | | | |
| Discussion: | <p>↑ For the full Ticket to Work Presentation, please select the link above!</p> <p>James said he will be covering the following in today’s presentation on Ticket to Work.</p> <ol style="list-style-type: none"> 1. What are the SSDI and SSI programs? Who receives these benefits? 2. What was Congress’s intent behind the Ticket to Work? 3. What are the basic work rules for SSI & SSDI beneficiaries? 4. What are the basic rules of the Ticket? 5. How many Vermonters are participating in the Ticket? 6. How much revenue has VR generated from Ticket? 7. What does Ticket data tell us about consumer outcomes? <p>What are the SSDI and SSI programs?</p> | | |



Social Security Disability Insurance (SSDI) is a disability insurance program.

- You must be too severely disabled to work at a “Substantial” level.
- Must have worked a minimum number of quarters to be eligible for the program. Benefit amount depends on amount Social Security taxes paid in (average is \$1,197).
- SSDI is not means tested. You can be a billionaire and receive SSDI.
- SSDI beneficiaries receive Medicare after a two-year waiting period.

Supplemental Security Income (SSI) is a basic support program.

- You must be too severely disabled to work at a “Substantial” level.
- SSI is based on financial need. Max federal cash benefit is \$750.
- SSI beneficiaries receive Medicaid.

Who receives these benefits?

- About 34,000 Vermonters receive SSDI or SSI benefits (or both).
- Both SSDI and SSI beneficiaries tend to be more severely disabled than non- beneficiaries served by VR.
- This is because both SSI and SSDI has a very high threshold for medical eligibility.
- SSDI beneficiaries tend to be older and have work histories. SSDI is often viewed as an early retirement program for individuals with chronic medical conditions.
- SSI beneficiaries tend to be younger with limited or no work history.
- SSDI beneficiaries are often very sick. 25% pass away within two years of being found eligible.

What was Congress’s intent behind the Ticket to Work?

- The SSDI Trust Fund was at risk of running out of money (like the Social Security Retirement Trust Fund).
- Very few SSDI beneficiaries leave the program to go back to work (about 0.5% per year).
- Congress wanted employment providers to help more beneficiaries go to work.
- A Republican idea, Ticket was intended to be a competitive free market approach.
- Providers would compete for beneficiary’s business.
- Unfortunately, Congress did not address some basic work disincentives built into the SSDI program.

What are the basic work rules for SSI & SSDI beneficiaries?

Basic concepts:

- Substantial Gainful Activity (SGA): The SSA earnings threshold to determine

eligibility. Generally, SSA will not determine you eligible for SSDI or SSI if you have worked at or above SGA in the year prior to application.

- Working above SGA is considered evidence that you may no longer be eligible for SSDI benefits after you have been determined eligible.
- The SGA threshold is \$1,180 for 2018.

SSDI:

- Beneficiaries get a nine-month Trial Work Period when the beneficiary can earn any amount. A beneficiary must earn \$850 or more to “use up” a Trial Work Month.
- Once the 9-month Trial Work Period is exhausted, beneficiaries receive a 36-month extended period of eligibility. During this period earnings above SGA (\$1,180 per month) will result in a suspension of the SSDI benefit for each month of SGA.
- Once the extended period of eligibility is exhausted, any earnings above SGA will result in termination of eligibility.
- The all or nothing nature of SSDI work incentives has been described as the cash cliff.

SSI:

- Beneficiaries receive a \$65 earned income disregard.
- Earnings above \$65 result in a \$1 for \$2 reduction in cash benefits.
- If the beneficiary zeros out their cash benefit they can retain eligibility for the program and Medicaid if earnings do not exceed \$41,367.
- It is important to note about 20% of beneficiaries receive both SSI and SSDI so they must deal with both sets of work rules.

What are the basic rules of the Ticket?

- All working age SSDI and SSI beneficiaries have a virtual “Ticket to Work”.
- The Ticket has no cash value. It is not a voucher for services.
- They can take their Ticket to any participating “Employment Network” provider.
- Employment Networks can be:
 - Government agencies like VR or DOL.
 - Private non-profits like Howard Center or Goodwill.
 - For profit providers like America Works.
 - Employers.
- SSA pays providers like VR for helping consumers work at levels that will:
 - Use up Trial Work Periods.
 - Help SSDI beneficiaries earn above SGA.
 - Help SSI beneficiaries zero out cash benefits.

- Payment is 100% outcome based and broken into Phases:
 - Phase One: For earnings at a Trial Work Level.
 - Phase Two: For earnings at SGA.
 - Outcome Phase: When beneficiaries no longer receive a benefit because of earnings.

How many Vermonters are participating in the Ticket?

- As of August 2018:
 - In Vermont there are 33,073 Ticket holders.
 - 4,049 (12.2%) have assigned their Ticket to DVR.
 - 61 have assigned their Tickets to other ENs.
 - Nationally only 2.5% of beneficiaries have assigned their Tickets.

How much revenue has VR generated from Ticket?

- Vermont DVR probably has been the most successful Employment Network in the USA. Ticket revenue for calendar year 2017 exceeded \$2.5 million which equals about 17% of the overall VR 110 budget.
- Ticket revenue has greatly lessened the impact of the \$5 million reduction in federal funds because of the loss of re-allotment.

What does Ticket data tell us about consumer outcomes?

- DVR looked back at beneficiaries who assigned their Tickets between 2008 and 2014. We found:
 - 40.23% achieved earnings to generate at least Phase One milestones. This means four out of ten consumers work at a Trial Work Level.
 - The median Ticket payment per beneficiary was \$4,444: This means most beneficiaries who do work, work at a Trial Work Level for at least 6 months.
 - The mean Ticket payment beneficiary is \$6,500.
 - 574 individuals had their benefits terminated for at least one month because of work, or about 15% of beneficiaries who assigned a Ticket.

Sherrie asked how many folks does VR see where a consumer's only goal is to increase their income but not get totally off benefits when working with VR to come up with an IEP that leads them to certain outcomes? James said that our counselors do not encourage consumers to work above what they want to work and if a consumer only wants to supplement their benefits, that is perfectly fine.

James further explained that what does tend to happen is as they get benefits counseling they decide they do want to work more as they realize that they will continue with an extremely low benefit rate if they don't work and this will be their income for the rest of their lives thus guaranteeing them a life of poverty.

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| | <p>Sherrie asked how the Benefits Counselors explain to VR consumers the positive benefits of Ticket to Work for them in terms of continuing disability reviews for instance.</p> <p>James said we don't make a big deal about it as it is a minimal benefit. We think it is deceptive to provide too much emphasis on it. We could have a chat on the sidebar on it as it is a very complicated subject. When Sherry is talking with VR consumers they have the impression that this is money to them and don't understand it goes to the employment net. James said that we have an FAQ that we encourage the Benefits Counselors to use. Our counselors clearly explain how the Ticket to Work Program works and most consumers don't have any problems with it. James will send out the FAQ that will provide more information.</p> <p>James asked if the group thought this presentation would be something the Full SRC would be interested in? The group supported the idea of a presentation to the Full SRC.</p> | | |
| | <p>*To Parking Lot Steering Committee – Ticket to Work Presentation at a future Full SRC meeting.</p> | | |
| Conclusions: | <p>Summary:</p> <ul style="list-style-type: none"> • SSDI and SSI beneficiaries are generally the most significantly disabled people VR serves. • Despite the challenges, many want to work and have assigned their Ticket to VRover 12% of the eligible population. • Despite the beneficiaries' level of disability and the work .disincentives built into the SSDI program....4 out of 10 work at least to a Trial Work Level. • About 15% work to a level that they zero out their benefits. | | |
| Action Items: | Person Responsible: | Deadline: | |
| James will send out an FAQ on Ticket. | James Smith | Done | |
| *To Steering Committee Parking Lot: Ticket to Work Presentation at a Full SRC | Debra Kobus | Done | |
| 7) Other Business (James Smith). | | | |
| Discussion: | None. | | |
| Conclusions: | Not applicable. | | |
| Action Items: | Person Responsible: | Deadline: | |
| None. | Not applicable. | Not applicable. | |
| 8) Adjournment (James Smith). | | | |
| Discussion: | James asked for a motion to adjourn. Nick Caputo moved to adjourn and it was seconded. No further discussion. Adjourned by consensus. | | |
| Conclusions: | Meeting adjourned at 11:22 am . | | |
| Action Items: | Person Responsible: | Deadline: | |
| Draft minutes uploaded to www.VTSRC.org | Debra Kobus | 10/15/18 | |

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| Draft minutes emailed to all Committee members. | Debra Kobus | 10/15/18 |
| Minutes Approved. | Committee Members | 12/06/18 |
| Approved Minutes uploaded to www.VTSRC.org . | Debra Kobus | 12/11/18 |

| Parking Lot. | | |
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| <p>Presentation requested on:</p> <ul style="list-style-type: none"> • a further breakdown of the demographics of those we serve (i.e. those receiving public benefits, etc.); • a comparative of outcomes by group; • Pre-ETS VR students with a state by state comparison. James said that this information was provided in the Needs Assessment a couple of years ago but Alice will include this information in her presentation. | James Smith and Alice Porter | Update 9/13/18 Currently we only have one quarter of data under the new system available. Hold for future presentation when outcome data is available. |
| <p>James will invite two or three VR counselors to come in and share successes/challenges and the story behind them. Being able to illustrate some of the challenges would be a good way to frame it (i.e. criminal history, substance abuse, housing, etc.) as it would give us some understanding where additional advocacy could be created.</p> | James Smith and VR Counselors | Open |
| <p>From 10/10/18 PR Committee Meeting – recommendation to forward to Steering Committee Parking Lot: Ticket to Work Presentation at a Full SRC.</p> | Debra Kobus | Done |