

**The Ticket To Work Program:
Marketing Strategies and Techniques
To Enhance Implementation¹**

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Executive Summary

The purpose of this paper is to provide a comprehensive review and critique of the marketing strategies best suited to expanding participation in the Ticket to Work Program by Ticket holders and increasing the number and diversity of Employment Networks. Direct mail, web based outreach, targeted marketing to selected opinion makers (such as disability physicians, private rehabilitation counselors, or family members), specialized media outlets, and a number of other marketing strategies will be critiqued and analyzed as a way to reach beneficiaries and ENs. The emphasis will be on cost efficient strategies to maximize the greatest utilization of the Ticket.

The two main marketing issues related to ENs are 1) there are not enough quality ENs and 2) the ENs in place are not taking Tickets and making a sufficient number of placements. Marketing considerations for ENs must expand the base of existing ENs to include the business community. EN partnerships are needed among the rehabilitation and business community, and marketing strategies that reach business and that encourage partnerships are needed. The main marketing issue for reaching beneficiaries of Social Security Disability benefits who are current or potential Ticket holders is recognizing that at its very core, marketing the Ticket to Work involves marketing employment first. Marketing considerations for beneficiaries must recognize and address the employment-related fears, interests and support needs of Ticket recipients.

Marketing strategies recommended for expanding participation by beneficiaries and ENs in the Ticket to Work program that are discussed in detail in this paper include:

1. Create a major Marketing initiative within the Ticket to Work program that would implement model demonstration programs, targeted marketing, business recruitment coordination, and evaluation of outcome. Enlist the assistance of marketing specialists to help package and coordinate the Marketing initiative.
2. Utilize existing resources that are working closely with the business community. For example, there are current initiatives in place with the National Chamber of Commerce and with Business Leadership Networks that could incorporate efforts to expand enrollment of businesses as ENs.
3. In segmenting the market of Ticket holders, work closely with minority communities, especially African Americans and Hispanic American communities, to market the Ticket to Work program as a way to enter the nation's labor force by using the appropriate Chamber of Commerce entities and also selected based organizations.
4. Promote use of the Small Business Administration and business trade associations such as the Society for Human Resource Management, and National Federation of Independent Business as a way to promote the Ticket.
5. Establish Model Demonstration projects that show the power of private sector entities serving as ENs in the Ticket to Work program.
6. Establish Model Demonstration projects would show the power of blending ENs from the private sector and public sector.
7. Invest heavily in a Ticket to Work Internet site that is linked to at least 20 major business and trade associations, both nationally and in each state where the Ticket program has been established.

8. Meet with at least 100 Fortune 1000 or larger corporations who would be willing to consider being an EN in high-density Ticket areas of the United States.
9. Target specific Ticket holders for targeted marketing to include email, direct mail, and use of radio and television in neighborhood communities where these beneficiaries live.
10. Establish partnerships at the community level that combine information on Benefits Planning, EN options, work-related supports, and the Ticket to Work in outreach efforts to beneficiaries.
11. Fund demonstration efforts that test different partnership arrangements to determine how best to conduct outreach on the Ticket to Work to people who, for example, are experiencing different primary disabilities, are youth/young adults transitioning from secondary and post secondary education and training settings, and/or are from different ethnic backgrounds.
12. Establish a national Technical Assistance program that would collect and disseminate information on promising practices in establishing EN partnership arrangements and marketing the Ticket to Work to beneficiaries and that would also provide direct technical assistance in the areas of marketing to ENs and marketing to beneficiaries.
13. Require that any EN who is marketing its services on an interstate basis offer a Toll-free telephone line for use by Ticket holders.
14. Cultivate the Project with Industry programs and One Stop Centers as key community hubs for outreach to Ticket holders and linkages to ENs (including employers), particularly those One Stops that have the newly established Program Navigator positions. Projects with Industry is a large established program in Vocational Rehabilitation where there are already large employer networks established. Maximize the use of the Office of Disability Employment Policy and the Employment and Training Administration within the Department of Labor to promote marketing of the Ticket through the One Stops.
15. Provide research and evaluation for marketing efforts and optimal market segmentation for appropriate Ticket holders to be targeted for marketing activities.

Eddie Guerrero studied communications and Spanish at George Mason University, where he earned a bachelor's degree in 1999. The 27-year-old Great Falls resident wants to work in customer service and build his resume to attain a government job.²

Guerrero, like thousands of other Northern Virginians, can't find work in the tough economic climate. But an economic upswing won't solve his employment struggle.

For 20 years, Guerrero has battled muscular dystrophy, an incurable neuromuscular disorder that can cause loss of muscle use. He uses a wheelchair and is unable to extend his arm to shake hands. He needs extra equipment to use the computer and phone, and employers often aren't interested in meeting these needs.

"Part of it is the perception of many companies that people with disabilities might be too much of a burden," Guerrero said Wednesday at the Crystal Gateway Marriott in Arlington. "It's a challenge to find an employer that is willing to make accommodations."

Berry Cuffee of Herndon and Joann McSorley of Springfield joined Guerrero Wednesday as the first three Virginians to receive Tickets to Work, a Social Security Administration program to help disabled people land jobs.

"The important thing here is choice," said Social Security Commissioner Jo Anne Barnhart. "We are giving people a choice where to find help if they want to work."

The work tickets, which will be mailed to about 196,000 Virginians over the next several months, can be used by Social Security Disability Income and Supplemental Security Income beneficiaries to obtain employment services. The voluntary program was created through a 1999 federal law and provides job support services through public or private employment networks.

Networks and ticket holders devise a plan to help the beneficiary find work. Eight networks offer vocational rehabilitation, job training and other support services to Virginia candidates.

"Most importantly, increases in work opportunities to people with disabilities increases their independence," Barnhart said. "In our country, [jobs] define who we are and what we do with our lives."

Nearly 70 percent of working-age disabled Americans are unemployed, and the threat of losing Social Security disability coverage, Medicare or Medicaid is a deterrent to finding work.

The ticket program aims to remove this barrier by ensuring immediate reinstatement of benefits if a person's medical condition forces them to stop working. This request must be made within five years after benefits, including Medicare and Medicaid, end.

²This case study is adapted from a November 14, 2002 article by Tom Steinfeldt with permission from the Northern Virginia Journal.

Virginia, 19 other states and Washington, D.C., are part of the program's second phase that covers about 2.6 million people. The first tickets were distributed to 13 states in February 2002. Tickets will be dispersed in Maryland and 16 other states in 2003.

Employment providers receive incremental payments from the Social Security Administration for successful job placement. Due to the program's infancy, only \$10,000 to \$15,000 has been distributed nationwide to Employment Networks through the Ticket program.

Annual funding will vary on the extent of placement, but the administration will not limit rewards to productive organizations, said Ken McGill, the Social Security Administration's assistant commissioner for employment support programs.

The program improves the hiring potential for Virginia's disabled community, but it will take one or two years to evaluate its success, said Joseph Bowman, commissioner for the Virginia Department for the Blind and Vision Impaired.

For Virginia's first ticket holders, it opens new doors to the job market. "It's not a matter of receiving a pay check," Guerrero said. "It's a matter of personal achievement - to create a sense of self."

This case study is a true-life description of what is happening in over two-thirds of the states in the country as the Ticket to Work program is implemented. A major aspect of this program is the use of a Ticket, which gives individuals with disabilities the power to select the program they want to help them go to work. The overall purpose of the program is also to expand the universe of service providers available to serve individuals receiving SSI and/or SSDI benefits in obtaining services necessary to find, enter, and retain employment. The key to its success, however, is marketing the Ticket so persons with disabilities will want to use it and, secondly, to identify organizations who are interested in becoming Employment Networks to work with the Ticket holders.

I. The Ticket to Work Program

The Ticket to Work and Self-Sufficiency Program is the centerpiece of the Ticket to Work and Work Incentives Improvement Act of 1999 (TWWIIA), and a key component of President Bush's New Freedom Initiative. The goal of the Ticket Program is to give disability beneficiaries the opportunity to achieve steady, long-term employment by providing them greater choices and opportunities to go to work if they choose to do so. The legislation also removes barriers that previously influenced people's choices between healthcare coverage and work. The Ticket to Work program; the Medicaid Buy-In; Benefits Planning, Assistance and Outreach (BPAO); and Protection and Advocacy for Beneficiaries of Social Security (PABSS) are key initiatives contained in TWWIIA for increasing employment outcomes for beneficiaries.

In 2001, SSA began contracting with national, state, and local service providers to become Employment Networks (ENs). Employment Networks are service providers that work with beneficiaries to provide support and employment-related assistance. The outreach for qualified providers and the contracting process is ongoing and open-ended throughout the life of

the Program. The Social Security Administration (SSA) issues Tickets to eligible adult (ages 18-64 years) beneficiaries. Tickets can be used to obtain rehabilitation and employment services from any EN a beneficiary chooses (as long as the EN agrees to accept that individual's Ticket). Beneficiaries receiving Tickets are not required to participate in the Program or go to work. They may choose to use the Ticket and contact any EN of their choice to discuss services. After the EN of choice and the beneficiary design and agree upon an employment plan, the Ticket is then assigned to the EN. To allow thorough evaluation and to ensure full implementation of the Ticket program on a timely basis, the program is being implemented in three phases. States and territories are divided among the 3 phases. Within each phase, tickets are being released in one-tenth increments based upon the last digit of the SSN.

Once an EN chooses to work with a beneficiary, they are responsible for providing the agreed-upon services as long as the Ticket remains assigned to them. Once the beneficiary reaches the Ticket Program key outcome – employment at the Substantial Gainful Employment level for defined time periods - ENs become eligible to receive payments from the Social Security Administration. In addition to the Ticket Program, SSA established other service supports in the form of locally based organizations that provide benefit planning, assistance and outreach to beneficiaries, as well as legal services through protection and advocacy systems in each state.

Any agency or state/political subdivision or private entity that can provide or arrange for the delivery of services is eligible to apply to be an EN. As seen in Table 1, ENs can be a single entity, a consortium, or an association of organizations collaborating to combine resources to serve Ticket-holders.

Table 1
Examples of Potential ENs

• Disability-Rehabilitation Providers	• Employment Agencies
• State VR Agencies	• Independent Living Centers
• WIA One Stop Centers, Boards	• Former Alternate Participants (APs)
• Transportation Providers	• Educational Institutions
• Community and Faith-Based Non-Profit Organizations	
• State/Local Government Human Service Agencies	
• Employers and Chambers of Commerce/Business Councils	

The Ticket to Work program is heavily dependent on the number and quality of Employment Networks (ENs) willing to participate as providers, as well as their respective capacity to be successful. If there are insufficient ENs, then Ticket holders will not have real choice in selecting an EN. If Ticket holders then receive inept/inadequate job procurement and job supports, they will then dropout of the Ticket program in large numbers. The Ticket program is extremely dependent on beneficiaries who upon receiving the Ticket, actually act upon it by searching for appropriate ENs. Beneficiaries then need to surrender their Tickets to an ENs who they have confidence can help them be successful with their return to work effort. **In short,**

there are two marketing efforts that are critical: First, marketing to beneficiaries to act upon their Ticket, and second, marketing to ENs to participate and be effective. For further and more indepth information on the roles associated with how the Ticket program can be implemented, the reader is referred to an excellent overview by Growick (2001).

Therefore, it is the purpose of this paper to provide a comprehensive review and critique of which marketing strategies are best suited to meet the above described needs in the Ticket to Work implementation process. Direct mail, web based outreach, targeted marketing to selected opinion makers (such as disability physicians, private rehabilitation counselors, or family members), and specialized media outlets will be critiqued and analyzed as a way to reach beneficiaries and also ENs. The emphasis will be on a cost efficient strategy to maximize the greatest utilization of the Ticket. There are two main issues related to ENs: 1) there are not enough quality ENs and 2) the ENs in place are not taking Tickets and making a sufficient number of placements.

It is also important to emphasize that marketing the Ticket to beneficiaries, at its very core, involves marketing employment to them. Marketing considerations for beneficiaries must recognize and address the employment-related fears, interests and support needs of Ticket recipients.

The marketing of the Ticket to Work program needs to be approached in a similar way to any new innovation. This means that it is critical to study those who are already using the product and identify those who are most likely to benefit from it. We therefore consulted with marketing experts and direct mail companies as to optimal strategies for communicating the Ticket as a viable product. This information was then synthesized and integrated into a paper that describes what is being done and what needs to do done to enhance marketing plans.

II. Current Marketing Efforts with the Ticket to Work and Related Federal Initiatives

The Social Security Administration has contracted with Maximus to be the Program Manager for the Ticket to Work Program. Along with the marketing efforts of Maximus, SSA has also initiated its own outreach and marketing efforts to beneficiaries for the Ticket to Work. These efforts include SSA developing notices focusing on the Continuing Disability Review (CDR) protections for Maximus to use with the Ticket and sending beneficiaries a letter and a booklet with the Ticket explaining the TTW program (Social Security Administration, February 2003).

Marketing the Ticket to potential Employment Networks and to Ticket recipients is a primary responsibility of the Program Manager, Maximus. At the November 12, 2002 meeting of the Ticket to Work and Work Incentives Advisory Panel, Mary Satterfield, the Project Director at Maximus for the Ticket to Work and Self Sufficiency Program, made a presentation on the efforts of Maximus to date in marketing the Ticket to potential Employment Networks. The following points are drawn from her comments to the panel.

- There was a short start-up timeline for the Ticket program, which influenced there not being a major national public awareness program preceding the implementation of the

Ticket initiative. The marketing efforts of Maximus therefore focused initially on bringing awareness about the Ticket to the community. Maximus found that when the national awareness campaign began, very few organizations had information about the Ticket.

- From the perspective of Maximus, its efforts to market the Ticket began only after the release by SSA of the Request for Proposals asking providers to submit applications to become ENs.
- When a Ticket rollout phase begins in a state, Maximus attempts to stratify the audience in each rollout state and customize its marketing message. Maximus attempts to identify and engage key decision-makers.
- The customized marketing messages used by Maximus include promoting the opportunities found in the Ticket program, its flexibility and adaptability, its voluntary basis for Ticket holders, its non-prescriptive nature, and the potential for partnerships.
- The specific outreach methods used by Maximus include sponsoring its own events, exhibiting/presenting at targeted market conferences; arranging face to face meetings; conference calls; direct mail campaigns; email campaigns and strategies; listserves; and articles, stories and ads in trade publications and newsletters.
- Maximus analyzes the role in each state related to the Ticket of key agencies such as Departments of Labor, Education, Mental Health/Mental Retardation, and Vocational Rehabilitation, as well as key consumer groups.
- Maximus also analyzes beneficiary demographics and labor markets, including unemployment rates and urban/rural nature of jobs, as a part of building beneficiary interest and employment networks.
- Maximus works to leverage success in a state, such as working with state level (e.g. Governors Task Force on Employment of Individuals with Disabilities) and more regional/local level “champions” (e.g. grass roots advocacy organizations) to build collaborative partnerships to support the Ticket effort.
- Maximus has noted four primary potential sources of ENs: The public and quasi-government sector (including One Stop Centers), the private non-profit sector, the business sector, and the education and learning institution sector. Generally to date, the business and the education/learning institution sectors have shown little interest in becoming ENs.
- As of November 2002, Maximus has made approximately 150,000 to 200,00 marketing contacts with potential ENs and had received 629 applications to become Employment Networks.³

(Ticket to Work and Work Incentives Advisory Panel, 2002)

The comments of Ms. Satterfield to the Ticket to Work Advisory Panel reflect the complexity of the marketing efforts to date by Maximus and the challenges it faces in building awareness and interest in the Ticket among both potential Employment Networks and SSI and SSDI beneficiaries who are Ticket holders. The comments and current EN enrollment data also reflect the very limited initial return Maximus has received in terms of EN interest in response to its marketing efforts. In building the base for discussions that follow in this paper on potential

³ As of February 22, 2003, the Maximus website reported that over 750 ENs have been approved (Maximus, 2003a).

marketing strategies that could be used with the Ticket to Work, it is important to review the marketing strategies used in other federal programs targeted to populations of individuals with significant disabilities and/or economic disadvantages.

The federal Welfare to Work Grants Program initiative contains a number of marketing challenges and potential examples that have implications for marketing of the Ticket to Work. Nightingale, Pindus, and Trutko (2002) describe the efforts of Welfare to Work grantees in response to the charge set by Congress to serve individuals who are or were recipients of Temporary Aid to Needy Families (TANF) and who would face the most difficult barriers to employment. As found with the Ticket to Work in the first-phase rollout states, targeting and enrolling the intended recipients of the Welfare to Work services were very challenging early implementation issues. States initially were not meeting their planned enrollment levels. With the use of targeted outreach and marketing strategies, states were able to increase enrollment in the Welfare to Work program and to meet targeted participation levels (Nightingale et al, 2002). The Welfare to Work programs adopted multiple strategies to address the enrollment issue. Some examples are as follows:

- Focus first on specific sub-groups of the overall population, build success, and expand to the larger population.
- Select service contractors who have special experience with the targeted population and who are currently serving this population; providers then established their own outreach to recruit individuals for the Welfare to Work program, therefore directly linking the provider to the intended beneficiary of the service.
- Undertake direct outreach to the targeted population through making presentations on the Welfare to Work program at locations where that population seeks assistance. These locations include local Social Services Agencies and other service providers, and also at job fairs and career centers where those individuals interested in employment are coming for information on jobs.
- Undertake more indirect outreach through distribution of flyers/brochures at Social Service agencies and One-Stop Career Centers (for example) and through public service announcements in the local media.

(Nightingale et al, 2002)

A significant difference in the set-up of the Welfare to Work Initiative and in the Ticket to Work is that SSA uses a national Program Manager, Maximus, as a key source of information for potential Employment Networks and for Ticket holders. The Welfare to Work program does not have a national program manager; marketing strategies are developed and implemented by state and local grantees. Another significant difference is that the Welfare to Work program did have participation requirements and potential sanctions for mandatory participants; the Ticket to Work Program is strictly voluntary. However, there are important similarities in the Welfare to Work and the Ticket to Work programs: Both have employment as a primary intended outcome, and both target populations who have historically had low return to work rates and who face multiple employment challenges. Therefore, the targeting and marketing strategies that have been successful in the Welfare to Work program are a potential resource for the Ticket to Work.

A second example of the marketing steps taken with a federal program involves the State Children's Health Insurance Program (CHIP). Congress initiated the CHIP program through Title XXI of the Social Security Act as a part of the Balanced Budget Act of 1997. The CHIP block grants provided funds for use by states to expand the health insurance coverage available for uninsured children from families who were financially unable to purchase private insurance and did not qualify for Medicaid (Wegener, 1999). States and localities used numerous marketing strategies to make information about the CHIP resource available to potentially eligible families and to encourage their enrollment. Wegener (1999) and Mickey (1999) identify the following example components of outreach strategies utilized for CHIP:

- Multimedia ad campaigns and direct mailings to potential CHIP beneficiaries.
- Toll-free hot lines and help-lines as well as web sites to provide information about the program and how to enroll.
- Out-stationing outreach workers in places in the community frequented by targeted families, such as Social Service settings.
- Using state and local level advocates for the targeted families to preview CHIP marketing information and to give direction to the sponsoring agencies on how best to implement CHIP.
- Targeting information to small businesses who frequently did not pay health insurance as a benefit and who therefore had uninsured employees who were potential candidates for health insurance coverage through CHIP.
- Making information on CHIP available through the school systems and establishing additional partnerships with other education and service agencies that serve the families of potential CHIP beneficiaries.

There is limited empirical evidence available on which outreach strategies are most effective in increasing enrollment in the CHIP program (Wegener, 1999). As seen with the Welfare to Work program discussed earlier, the CHIP initiative involved grants from the federal to the state and community level without the national Program Manager used with the Ticket to Work program. Therefore, the Welfare to Work and CHIP programs do differ from the Ticket to Work's use of a Program Manager with national marketing responsibility. It is also difficult to document empirically which specific outreach and marketing effort to potential participants have been most effective in increasing enrollment in the Welfare to Work and/or CHIP programs. However, a number of the example marketing strategies used in the Welfare to Work and CHIP initiatives are worthwhile examples for consideration and possible use with the Ticket program. Both programs attempted to reach and engage the targeted population by:

- tailoring their marketing campaigns to state and community level considerations,
- establishing partnerships with local agencies and programs,
- targeting sub-groups within the overall eligible population who were most likely to respond to the outreach effort,
- using outreach workers located in key settings, and
- selecting service contractors who were currently working with potential beneficiaries of the CHIP and Welfare to Work initiatives.

The direct implications for the Ticket to Work program of these example marketing strategies drawn from the CHIP and Welfare to Work program will be developed in Section IV of this paper, Marketing the Ticket to Beneficiaries. It is important to note also that the CHIP program's targeted marketing initiative with small businesses who need help in getting health insurance for their employees has particularly strong implications for the Ticket to Work program. In this example, both the business and its employees would benefit from the health insurance coverage offered by CHIP. Therefore, business becomes a strong advocate of the federal initiative. As will be developed further in the Marketing the Ticket to Work to Employment Networks (Section V) of this paper, business is currently a largely an untapped resource for use with the Ticket.

III. Marketing Principles and Strategies: An Overview⁴

To fully understand the best ways to market to beneficiaries and also market to ENs, it is essential to have an understanding of what marketing is and how marketing principles and strategies are implemented. Essentially, marketing in the context of this paper is about SSA or its designate reaching as many beneficiaries as possible with Tickets and persuading them to go to ENs for the purpose of becoming employed with earnings above the SGA level. Marketing is also about the ENs persuading Ticket holders to come to them for job services and stay with them.

A key marketing concept is demand, which is a human want, such as a Ticket holder who desires to work and is backed by buying power of the Ticket. The buying power aspect of marketing is what makes the Ticket a unique approach to employment services. Historically, individuals with disabilities have not had buying power control of the services they wanted. People demand products with benefits that are satisfying to them based on their wants and available resources. An individual will satisfy his/her needs with products and services. A product such as job support or a special accommodation may satisfy a vocational need or want, such as the client's job adjustment or the employer's satisfaction with a cost efficient worker.

For example, SSA beneficiaries have a need to work to improve their economic outcomes. SSA beneficiaries' needs must be inherent in effective marketing. Finding ways to fulfill and to communicate the Ticket to Work program will be critical to its success. We now turn to the underpinnings of marketing management philosophies and how they are interrelated.

Marketing Management Philosophies

In order to fully understand the marketing mission facing SSA with regard to the Ticket and also how marketing techniques may be applied, it is important to realize there are two exchange paradigms in place: 1) The exchange between SSA (or its designate) and Ticket holders; and 2) the exchange between SSA and the ENs. Marketing philosophies and techniques need to be managed to gain the best return on investments.

Marketing management involves carrying out tasks to achieve desired exchanges with a particular targeted market. For the Ticket to Work Program to be effective, there must be an

⁴ We are indebted to Robin Russell for her assistance in this section.

ongoing exchange between the beneficiary (Ticket holder) and the EN. In order to understand how ENs will need to attract beneficiaries to surrender their Ticket, it will be helpful to understand five key marketing management philosophies -- production, product, selling, marketing, and societal marketing. These five concepts are the guide organizations use to conduct marketing activities. For example, the production concept holds the belief that a consumer will prefer the product that is highly available and affordable. Hence, ENs will more likely get the business of Ticket holders if they are physically accessible, close in proximity to where beneficiaries live, show that they are "disability friendly", and aggressive in pursuing the beneficiaries' Ticket. This thinking leads into the product concept, which suggests that a consumer (i.e., Ticket holder) will prefer the product (i.e., EN), that offers the most quality, performance, and features. The selling concept holds the belief that the consumer will only buy the organization's product if the organization embarks on a large-scale selling and promotional effort.

For example, those ENs who invest significantly in selling expertise will be able to reach Ticket holders better than those who do not. The focus of the selling concept is on the products the company already has rather than a brand new product. The marketing concept holds the belief that in order to achieve organizational goals, the company should determine the needs and wants of target markets and deliver the desired satisfaction more effectively and efficiently than their competitors. The customer is the major focus of the marketing concept.

The last concept is societal marketing, which holds the belief that a company will determine the needs and wants of their consumers and deliver the desired satisfaction more effectively and efficiently than their competitors. Societal marketing is a more recent concept than any of the other marketing management philosophies, as was noted in the recent presentation made to the Ticket to Work Advisory Panel by an expert from a major public relations firm, Fleishman & Hilliard. (P. Johnson, November 13, 2002). The focus of this concept is on the long-term, overall consumer welfare rather than short-term wants. A company that shows responsibility for the community and environment is an example of a company that follows the societal marketing concept. This concept is critical to the Ticket program because to maximize their services, ENs will need to work with other human service agencies, families and Ticket holders.

In order to implement a marketing campaign that will create a greater number of ENs in the marketplace and make them more effective, Johnson (2002) identifies five important keys to running any such campaign. These are: **1) Be selective**--Talking to everyone can be like talking to no one; **2) Have clear behavioral objectives from the outset**--If you don't know where you're going, you're likely to end up someplace else; **3) Identify and address barriers**--At the heart of changing behaviors is understanding what barriers exist to prevent your target audience, in this case ENs, from adopting the new behavior; **4) Hone your message and stick to it**--Audiences need to see issues in people terms, not in expert terms. They need to have clear choices presented to them and then time to work through the alternative choices and their role in them. Potential ENs will be no different. **5) Integrated marketing communication works**--Marketing tools have some kinds of effects for some kinds of people some of the time. Not knowing what to do, programs often use mass media to overcome lack of grass roots work. This

is often a mistake, and to date, it probably has been the major mistake in the marketing outreach to ENs for the Ticket to Work.

Consider the following example of the staffing company, Exclusive Staffing, partnering with the Richmond City School System to become an EN. Exclusive Staffing, a minority owned staffing agency in Richmond, Virginia, employs temporary to permanent workers in secretarial, administrative, clerical, technical, and professional positions. It also provides employees for several large corporations in the Richmond area. Richmond City Schools could assist in training students through their vocational education programs to provide valuable employees to companies served by Exclusive Staffing. Students transitioning to the work world would greatly benefit. Exclusive Staffing would also greatly benefit by having a new qualified pool of applicants. The two organizations could share payments received from SSA. The relationship would be an excellent EN model for social responsibility, as well as bettering the lives of students with disabilities entering and gaining competitive employment.

Use of the Internet to Enhance Marketing

Recent technological advances have changed the marketing landscape dramatically and have created a new Internet age. In order to survive in this new environment, companies must adapt their marketing strategies and tactics. The Internet's revolutionary technology has shaped the new millennium and can have a tremendous influence on individualizing marketing efforts with beneficiaries and ENs. There are several underlying forces that are repeatedly reflected when the Internet is utilized. These include the use of intermediaries, customization, and customerization. For example, intermediaries include both entities that may only be available via the Internet as well as those that have retail stores and online stores. This allows those retail stores to connect with customers and increase business by being available through several channels. Customization allows businesses to customize their products and services, messages, and media for the individual buyer. Another one of the key Internet marketing terms is customerization, which allows individuals to design their own product based on all available options. Each of these have serious implications in the education and information referral for SSA beneficiaries who are Ticket holders. These three marketing concepts are about how to most efficiently match up high probability SSA beneficiaries who are Ticket holders with viable ENs.

In order to utilize the Internet as a way to market the Ticket program, it is necessary to understand the concept of E-business, an electronic means to conduct a company's business. E-commerce includes buying and selling methods that are supported by electronic means, principally through the Internet. E marketing is the selling side of e-commerce, and e purchasing is the buying side of e-commerce. Just consider the extraordinary power and efficiency of how the Internet might be utilized for matching Ticket holders up with interested ENs.

For example, consider how Robert, a Ticket holder, with a long-term history of psychiatric disabilities but tremendous interest in using his computer daily, might regularly surf for ENs in his geographical area that offer attractive jobs or market appealing types of employment fee arrangements and speed of job identification. Alternatively, consider how easy it would be for the Bank of America in establishing its new call center to scan dozens of Ticket holders in the existing geographical area and send out invitations for individuals to apply for

available positions. Bank of America would communicate with SSA or its designate, Maximus, to identify zip codes of Ticket holders and target them for direct email or direct mail marketing.

E-commerce has many advantages that make buying private and convenient, with greater selection and greater access to products. E-commerce is also advantageous to sellers because it reduces selling costs, provides greater access to global markets, increases speed and efficiency, and helps build customer relationships. A company can conduct e marketing in several ways. Creating a Web site, placing ads and promotions online, setting up or participating in Web communities, and using online e-mail or webcasting are all ways that a company can attract new customers to their business and maintain existing customer relationships. Companies must incorporate online marketing into their future marketing plans so that they will have a fully integrated marketing mix. Targeted emailing, while obnoxious and a nuisance to many, is one way to efficiently communicate about the Ticket and how it might work to selected (but not all) beneficiaries. This would be an excellent way for an EN to utilize customerization on the Internet to recruit Ticket holders.

The Marketing Process and Marketing Analysis

The definitive marketing process consists of several steps. These steps include a) analyzing marketing opportunities, b) selecting targeted markets, and c) developing and managing the marketing mix. These steps will be discussed and examined further.

Analyzing marketing opportunities means that a company will divide its customers' needs, as well as product information, to determine how their organization can meet these needs. **Market segmentation** involves dividing a market into different groups with different characteristics and behaviors that may require separate products. A market segment focuses on a particular group of consumers that may respond to a similar way to a particular set of marketing efforts. Marketing segmentation will also be discussed in detail in the next section.

For example, an EN such as J. W. Marriott Corp might choose to focus on one particular market segment early on, such as those Ticket holders only with mental retardation or only with visual impairment, and add segments as business begins to increase. Market positioning is arranging the company's product in the minds of its target customers so that it occupies a clear, distinctive, and desirable place relative to similar products. This would allow Marriott to develop expertise unique only to the job needs of this particular population. The final step of the marketing process is the development of the marketing mix and is defined as a set of controllable, tactical marketing tools (such as product, price, placement, and promotion) that a company combines to produce the desired response from their targeted market. These tools will influence supply and demand responses from Ticket holders to different EN marketing strategies.

Market Segmentation

Market segmentation is the process of dividing a market into smaller groups of buyers with distinct characteristics, needs, or behaviors that may require different marketing mixes or separate products. This concept has special meaning for the next section of this paper that analyzes which SSA beneficiaries might be good targets for marketing of the Ticket. **There are several levels of market segmentation: 1) No segmentation, also known as mass marketing,**

2) complete segmentation, which is also known as micromarketing, or 3) somewhere in between these two concepts, which is also known as niche marketing. Mass marketing involves mass production, distribution, and promoting of a product in the exact same way to all consumers. In many ways what appears to now be happening is mass marketing of the Ticket to no specific target groups. Micromarketing tailors products and marketing programs to match the tastes of specific individuals and locations. Segmented marketing involves the isolation of broad segments and makes offers to those segments that match the needs of one or more of the segments. Niche marketing focuses on subgroups that have been narrowly defined within the segments, such as groups that have a distinct set of traits that may seek a special combination of benefits.

There are numerous individual ways to segment a market. Major corporations face this dilemma daily as they decide how to invest limited marketing dollars. Different variables can be chosen in order to determine which will give the best segmentation opportunities. It is specifically these variables, however, that are critical to uncover for making one's marketing effort most efficient. Consumer marketing focuses on geographic, demographic, psychographic, and behavioral variables. Geographic segmentation divides the market into different geographical units such as nations, regions, states, counties, cities or even neighborhoods. Demographic segmentation divides the market into demographic variables based on age, gender, family size, family life cycle, income, occupation, education, religion, race, generation, and nationality. Psychographic segmentation divides the market into different groups based on social class, lifestyle, or personality characteristics. Behavioral segmentation divides the market into groups that are based on consumers' knowledge, attitudes, uses, or response to a product. Each of these segments has immediate application to the Ticket program, as will be seen below.

Advertising. Advertising is any paid form and promotion of ideas, goods, or services by an identified sponsor that is nonpersonal. An advertiser such as an EN recruiting Ticket holders must make decisions regarding its objectives, budget, the message, media, and evaluating the results of their efforts. The objectives should be clear and determine whether the advertiser will inform, persuade, or remind buyers of their product. The budget should be based on what is affordable to the EN, as well as what other ENs are spending. The media decision is based on the particular reach, frequency, and impact goal. The major media type must be determined, and the media vehicle must also be determined along with the media timing. Major media types include newspapers, television, direct mailings, radio, magazine, and finally, the Internet.

Sales Promotion. The next step in the marketing communication mix is sales promotion. Sales promotion involves a variety of consumer and trade promotion incentive tools that include coupons, premiums, contests, and buying allowances. Consumer promotion tools are focused on the consumer; trade promotion tools are focused on retailers and wholesalers. These tools are designed to stimulate additional business for the company.

Public Relations. Public relations is another aspect of the marketing communication mix that is used to help build relationships with the company's various publics. Press relations tools can include news, speeches, special events, written materials, audiovisual material, corporate identity materials, public service activities and finally, the company website. Public

relations objectives, messages, implementation, and evaluation should be carefully set and should blend effectively with the company's other communication efforts.

Selling. Personal selling is considered the interpersonal focus of the integrated communication mix. Building and managing a successful salesforce is very important to the success of personal selling. The company's sales force should assist in the development of profitable and long lasting relationships with its customers that is based on customer value and satisfaction.

Direct Marketing. Direct marketing is the final step of the marketing communication mix. It focuses on connecting directly to targeted individuals to obtain immediate results and long lasting relationships. Direct marketers use detailed databases so that they may tailor their offers and communications to the certain market segments as well as the individual buyer. Direct marketing has become the fastest growing form of marketing due to its low-cost and efficient way of reaching customers. As indicated earlier in this paper in the examples of marketing strategies used by in the Welfare to Work and CHIP programs, direct marketing can involve first identifying sub groups within the overall population who have the highest potential to respond to the marketing message and then tailoring the marketing message to these sub groups. For the Ticket to Work program, these sub groups of Ticket recipients could be identified in terms of age, work history, length of time on SSA disability benefits, and current work status. The direct marketing possibilities for the Ticket to Work are discussed in the following discussion on marketing the Ticket to SSA beneficiaries.

IV. Marketing the Ticket to SSA Beneficiaries⁵

Currently, based on the rollout schedule established by the Social Security Administration for the Ticket to Work, beneficiaries of SSI or SSDI receive their Tickets through the mail from the Program Manager, Maximus. The Ticket packet contains a Ticket to Work and information describing the Ticket program. A toll free number for Maximus (1-866-YOUR TICKET/1-866- 968-7842) is provided in the packet, and Ticket recipients are encouraged to call this number to find out about Employment Networks in their area. The toll free line at Maximus is answered by an Employment Network Consultant (ENC) who will talk to the Ticket holder about employment needs and interests and will give contact information for the EN options in the caller's local area (Maximus, 2003c). Ticket holders also have a web site available at Maximus - http://www.yourtickettowork.com/th_faqs – that provides a variety of information for Ticket holders, including a directory of current ENs. A locator is provided at the web site that can be used to sort ENs by zip code, City, or County. Contact information is provided for each EN, as well as information on the services that EN provides and the disability areas served.

As of February 10, 2003, SSA reports that over 2.8 million Tickets have been mailed and approximately 13,285 Tickets had been assigned to ENs (SSA, 2003). This SSA report represents a Ticket assignment rate to ENs of approximately ½ of 1% of Tickets. These response figures indicate that current marketing efforts to Ticket recipients are generating only a very minimal response by Ticket holders. The purpose of this section of the paper is to review potential factors that are limiting the success of the marketing efforts to Ticket recipients and to

⁵ We are indebted to Dan O'Brien for his assistance in this section on marketing to beneficiaries.

describe marketing strategies that have the potential to expand interest of Ticket holders in using the Ticket to achieve a desired employment outcome.

As a preface to a discussion on marketing Tickets to beneficiaries, it is important to note an example of what a Ticket holder would find if he/she sought information from the Maximus hotline or Web site for the EN resources serving the city of Richmond, Virginia. Richmond, a mid-sized city of approximately 200,000, is the state capital. Virginia is a second phase rollout state for the Ticket, so SSI/SSDI beneficiaries living in Richmond City are currently receiving Tickets. A search on January 26, 2003 of the Maximus Web site of ENs for Richmond, Virginia identified 9 EN options: The Department for the Blind and Vision Impaired; the Department of Rehabilitative Services (the general VR agency for Virginia); and seven out-of-state ENs located, for example, in Texas, Florida, Nevada, Washington D.C. and Connecticut (Maximus, 2003b). A number of these out-of-state ENs did not provide a toll-free phone number. A Richmond City resident seeking a Richmond based EN option has only the state VR agencies or out of state ENs where the Ticket holder has limited to no opportunity for face to face discussion of employment interests and service needs. To contact the out-of-state ENs who do not offer toll free telephone lines, the Ticket recipient will need to incur the expense of the phone contact, which can be a financial burden and disincentive. The need to market more effectively to ENs is addressed elsewhere in this paper. However, a key to successful efforts in marketing to Ticket holders will be the EN resource options available for them to pursue employment objectives with confidence and support. The marketing issues related to the Ticket for ENs and Ticket holders are inseparably linked and must be addressed in tandem.

The Ticket to Work is designed as a tool for SSI and/or SSDI beneficiaries to use in pursuing employment outcomes. As stated earlier, marketing the Ticket to beneficiaries involves marketing employment to them. **It is the premise of this discussion that SSA must refocus its marketing efforts for the Ticket to Work to address the employment related fears, interests and support needs of Ticket recipients.** The Ticket is just one tool, though potentially a critically important tool, in helping a SSI/SSDI recipient achieve an employment outcome.

The current marketing strategies to Ticket Holders have a number of limitations. First, the current marketing efforts start with a mailing to the individual, but there is no planned follow-up with Ticket recipients on how to help address the many anxieties experienced by Social Security disability beneficiaries around work. Second, the marketing effort is not differentiated to various segments among the Ticket recipients who potentially have a higher comparative employment profile, such as individuals who:

- Are in certain age ranges that potentially have a greater interest in working at SGA level, such as 18-35.
- Have worked within the last 5 years.
- Are currently working part-time.

Third, the current Ticket marketing effort does not strive aggressively to support community level partnerships that would potentially help make the Ticket holder fully aware of the how work would affect Social Security disability benefits. For example, in Oklahoma, there is a partnership among an advocacy organization, local ENs, the One Stop Center, and the State VR

agency working together to provide a full range of information and support on work and disability benefits to Ticket holders. This example is described in detail at the end of this section.

Fourth, the marketing effort, as indicated by Ticket assignment figures to date, does not effectively help to engage the Ticket holder in an employment service and support plan leading to an employment outcome. These limitations must be addressed in revised efforts to market the Ticket to Work to beneficiaries.

Key Considerations in Developing a Marketing Plan to Ticket Holders

There are at least four key considerations in developing an employment oriented marketing plan for Ticket holders. These include:

1. The Ticket holder's age, work history, and disability related employment issues.
2. The Social Security disability benefits being received and the specific considerations affecting SSI benefits as compared to SSDI,
3. The specific services and supports needed for Ticket holders to achieve and maintain employment outcomes and the partnerships potentially needed for these services to blend together successfully.
4. Community-level partnerships and strategies that effectively support Ticket holders pursuing employment outcomes.

A brief discussion of each of these considerations follows.

Age, Work History, and Disability Related Employment Issues. Currently, the Ticket marketing strategy to beneficiaries does not differentiate based on considerations such as age, work history, and disability related employment issues. For example, youth in the transition period from secondary level education will potentially have different issues (i.e. family concerns about work and impact on SSA disability benefits, lack of employment experience, interest in post secondary training/education) related to work than middle aged to older adults. The disability related employment issues of individuals who have severe and persistent mental illness are very different, for example, from individuals with developmental disabilities (Bond et al, 2001; Wehman & Revell, 2003). The age, work history, and disability of Ticket recipients all impact their fears, interests, and needs related to employment, particularly when SGA level earnings that will result in loss of cash benefits are involved, as found with the Ticket to Work.

Social Security Disability Benefits Received. The impact of employment on disability benefits is different for SSI and SSDI recipients. Earnings below SGA level impact SSI and SSDI benefits differently. The SGA thresholds are different for SSI and SSDI recipients. SSDI recipients are individuals who have a work history; many SSI recipients do not have a work history. When approaching SSI and/or SSDI beneficiaries about using the Ticket, the differences in work histories and how earnings impact their benefits must be built into the marketing strategy.

Services and Supports Needed to Achieve Employment Outcomes. For disability beneficiaries to utilize their Tickets, there is a need for a diverse set of EN options. This need is

most strongly indicated by the variety of workplace and related supports used by individuals with disabilities to be successful in employment. For example, there are a number of research-based practices that have demonstrated effectiveness in assisting individuals with severe mental illness. These include use of a rapid job search approach, individualizing job placements according to the individuals work preferences, long term maintenance of follow along supports, and close integration of the employment services with the employment supports (Bond et al, 2001). The services and supports needed to achieve a successful employment outcome vary considerably across the full range of individuals with a disability who are Ticket holders. For these individuals to make the commitment to work as required by the Ticket, they will need to be confident that the individualized supports each one will need are truly available in their community. This critical point reflects the dominant theme of this paper: For the Ticket to Work program to be successful, there must be ENs and EN partnerships available in the Ticket holders' communities that will commit to providing needed services and supports.

Community-level partnerships and strategies that effectively support Ticket holders pursuing employment outcomes. The implementation plan for marketing the Ticket to beneficiaries must incorporate the multiple factors impacting the decision a SSI or SSDI recipient makes regarding employment and use of the Ticket. The marketing plan must recognize that for most beneficiaries, the decision about using the Ticket and pursuing employment at an SGA level of earnings will first involve a full understanding of the impact of work on benefits. This decision will also involve identifying an EN that is responsive to the Ticket holders' needs and expectations in terms of job preferences and the availability of follow along supports to help the individual work through pre- and post-employment concerns. In other words, SSA should segment the market and develop marketing strategies for the unique subcultures represented in the disability community. Several disability clusters comprise the SSA disability rolls; developmental disabilities and mental health represent two of the distinct advocacy and support service networks that comprise over half of the beneficiary populations. Marketing strategies built on existing networks within the community could rapidly increase the market penetration of the Ticket to Work.

One such market segmentation strategy has been piloted in Oklahoma. The Social Security Administration, through the State Partnership Initiative project (SPI), is funding the Oklahoma Department of Rehabilitation Services to conduct the KEYS to Employment (KEYS) Project. One of the strategies used in KEYS is an assertive engagement approach. The strategy involves inviting Ticket eligible SSI recipients to a session to discuss work and the impact of work on Social Security Disability benefits. These invitations are initially done by mail and are followed-up with phone invitations. The invitations include offers for assistance in arranging transportation to the information sessions.

This group information session is conducted in Oklahoma City, for example, by a chapter of the National Alliance for the Mentally Ill (NAMI). It is important to note that the research design of the KEYS project involves only SSI recipients who are mentally ill. At the work session, the NAMI work incentives coordinator gives a presentation about Social Security work incentives and how beneficiaries can be successful in employment. Arrangements can be made for individual Benefits Planning sessions. Representatives from the ENs in Oklahoma City attend the sessions and give a brief presentation on their services. Arrangements can also be

made for services from the state Vocational Rehabilitation agency through the VR counselor who attends these sessions. The beneficiary can choose to meet individually with a potential EN at the session or can schedule a later time for the meeting. These Work Incentives sessions are now offered at the local One Stop Center. As a result, the Ticket holder has in one setting full access to information and supports that are critical to making a decision about work and disability benefits (NAMI, 2002).

The example from Oklahoma incorporates a number of key strategies that are critical to marketing the Ticket to beneficiaries include:

1. Tailoring a marketing campaign to specific population sub groups through use of a marketing message designed to engage to targeted population. In the Oklahoma example, this message is “Working for Wellness”. It is about work and the positive impact of work on quality of life. Although this specific wording of the marketing message will need to vary across populations, the key is to find a message that engages the targeted population in a discussion about work.
2. The marketing strategy recognizes the critical role Benefits Planning has in a Ticket holder’s decision about work and incorporates benefits planning into the outreach message.
3. Discussions about use of the Ticket are initiated only after the concerns of the Ticket holder with work and Social Security benefits are explored fully.
4. The Ticket holders have face-to-face contact with potential ENs who can describe their services.
5. The co-location of resources at the One Stop makes available to the Ticket holder a full range of services in one setting. Also, One Stops are designed to link closely with the local business community. It is a natural setting for employers who are ENs to use as a place to match with Ticket holders and to form partnerships with service resources at the One Stop. The One Stop setting places Ticket outreach efforts in a key community location identified with work and frequented by those individuals who are seeking employment related assistance.

Successful marketing of the Ticket to Work to beneficiaries will involve community level efforts that create partnerships as found in the Oklahoma example. It is important to note that the Oklahoma approach, with the use of NAMI (an advocacy organization), is an example of developing contracts/partnerships with advocates and service providers. One Stop Centers are a critically important potential hub in these partnerships. SSA has entered into an agreement with the Department of Labor to establish Program Navigator positions in One Stop Centers to assist individuals with disabilities, including but not limited to Ticket Holders, access needed services (Social Security Administration, October 16, 2002; Gerry, M., 2002). The program navigators are an excellent potential resource for a community level, targeted outreach effort for the Ticket. They can incorporate information about the Ticket into their work with individuals with disabilities and help navigate people through an individualized decision process about work, benefits, and use of the Ticket.

V. Marketing the Ticket to ENs

The employment networks (EN) play a very major role in the Ticket implementation, perhaps significantly more than has been written about to date or described in the available literature. As noted above, the capacity of ENs, the number available, and their willingness to work with Ticket holders will essentially make or break the long-term impact of this program. The ENs' role and function are described extensively in the Federal Register rules and regulations for the Ticket (Federal Register, Vol. 66, December 28, 2001). Basically, they are the entities that are charged with providing many vocational activities, especially the job search and ongoing employment service supports. It must be in the ENs' best interest to help Ticket holders maintain employment, a key to maintaining reimbursement under the Ticket program. As noted in the Federal Register, ENs can be charitable organizations such as local rehabilitation programs, state agencies supervising VR programs, One Stop delivery systems under the Workforce Investment Act, schools, or employers in business and industry. In short, there is a wide spectrum of groups that can be ENs.

EN reporting requirements include information to assist in determining whether a beneficiary is making timely progress toward self-sufficiency. Additionally, they must maintain information about a beneficiary's work activity and earnings so SSA can determine their effect on entitlement to benefits, benefit amounts and payments to the EN and/or VR.

Ultimately, the critical EN question is: **Which of these entities will want to participate in the Ticket program, and who can be effective?** We believe that this is the cutting edge question for the success of the Ticket program. We also believe that there are several ways that a more targeted and intensive marketing plan could possibly improve the number and quality of ENs. With the large number of beneficiaries, this could be a significantly positive opportunity for individuals who want to work competitively and also a source of payment revenue for employment organizations. On the other hand, poor quality ENs or too few will significantly depress the interest and demand on the part of Ticket holders.

For example, there are several thousand supported employment community programs (Wehman, Revell, and Kregel, 1998). Some of these have successfully helped SSA beneficiaries with developmental disabilities exit day programs into competitive employment and off the SSA disability rolls. However, the majority have not. As O'Brien (2002) notes, one of the clear risks that an EN must absorb is that some SSA beneficiaries may be determined unable to work and therefore constitute a high financial risk to the EN. With no funds appropriated for the Ticket, then payments will come in at a low level initially, even on the milestone program from the projected SSA savings. As an executive director of a community rehabilitation day program, would you choose taking a set amount of money each year (e.g., \$9500 per person for services) that is guaranteed from the state mental health department, or would you pick the employment outcome with lower funds from SSA that aren't guaranteed? The answer is pretty obvious, which is why many of these community programs may choose to not be heavily involved as ENs.

One possible alternative to this scenario might be if the state mental retardation or mental health agency or local funding agency to the day program is willing to maintain funding for SSI/SSDI clients in their program while the Ticket is being exercised and employment support programs are underway. In this fashion, the provider could reap the basic day services

funding AND also accrue the projected SSA savings. Will this happen? And are providers in the community willing to try and negotiate this? Good information and referral systems and a marketing plan will begin to answer these questions.

We believe that traditional day programs and community rehabilitation programs (CRP) can have a role as ENs, but financial incentives will have to be better developed to entice them to accept more Tickets. The CRPs have much expertise in job placement and career advancement but many will not respond if they fear they will lose money.

Two of the most viable EN categories that should be seriously encouraged to participate are a) public schools, and b) businesses in the community, both of which are potential EN sectors noted by Maximus earlier in the paper that have not responded to current marketing efforts. Let's look at the case for public schools first, who are one of the largest hiring entities in the country. More importantly, they are both in the business of training personnel and often placing them into business and industry. Most schools have some type of work experience, vocational-technical center, vocational education, and vocational evaluation component in their program. While they are not usually well experienced in job placement and employment, all of the other pieces are in place. They could front load the funds for placement and accept the risk since these students, for the most part, will be on a special education entitlement for services anyway. Secondly, the schools are under increasing pressure to place students into competitive employment before graduating. Participating in the Ticket program would be a possible vehicle to recoup some of these costs long term by the school district. Third, one of the fastest growing groups of beneficiaries going on the SSA rolls are young people, so interrupting this chain of dependence should be appealing to local and state officials. Finally, public schools bring many instructional and vocational resources to problem solving and community connections not the least of which is credibility in the employer community. Most employers have children in schools and they may be willing to work with school programs that are ENs.

Public schools, technical schools, and community colleges have a strong incentive and an established funding base to prepare individuals for work in many different careers. Using the same targeted business strategy, it would make a great deal of sense to meet on an individual basis with some of the larger community colleges. For example, a Dade County Community College in Florida or a College of DuPage in the northwest suburbs of Chicago and many of the large community colleges throughout California may all be very receptive to being an EN. This can best be accomplished through personal invitations to staff such as career counseling directors in an effort to communicate directly with them about how the Ticket can work and how it can be a benefit to them. Many of these arrangements maybe optimal if done in a shared way with large companies in the area or a staffing company, but there is also no reason that a large community college could not do this as well once they understand the program and how it could benefit them. The key issue with community colleges and large public schools is, once again, that they usually have the existing funding already in place to provide this service. Receiving SSA funding from the Ticket holder over a period of time would be considered a profitable value added activity, as well as important social responsibility to the community.

There is a second group of businesses that require a hard look as ENs. These are businesses involved in manpower development, placement services, and telemarketing services,

as well as large corporations who may have specific labor demands. Good examples of large corporations are banks, insurance companies, data processing companies or other corporations that have unique labor needs, such as staffing a call center. The use of the Business Leadership Networks, trade associations like the Food Service or Hospitality associations, or local or state chambers of commerce are all possible ENs or partnerships that could be formed.

One powerful arrangement would be the combined or blended EN. For example, a select business/association group combines with one school system. This then provides the labor supply in direct conjunction with the business/placement expertise with the two groups dividing up whatever SSA savings accrue. There would also be the intangible motivation of both groups to engage in a socially responsible activity that, for example, helps students with mental retardation/developmental disabilities have competitive employment work opportunities.

The use of the Projects with Industry (PWIs) program within Vocational Rehabilitation could be a very powerful means of leveraging existing business networks. PWIs are usually long term established companies or business associations who could be well positioned to implement the Ticket.

SSA Demonstrations. In order for these opportunities to occur, we believe that federal agencies need to test out these models through demonstration projects in different states to see the viability of how they unfold. Consider the power of Bank of America Corporation teaming up with the Charlotte, North Carolina public schools as an EN. All the above ingredients would be in place to roll out hundreds of SSA beneficiaries over a five to 10 year period. Now amplify this across 50 more cities and some progress might begin to be made. With this as a general background, let's now turn to more detail about the challenges to implementation. The concept of demonstrations is one of the most powerful marketing tools, i.e., "selling by example." This approach allows for trial and error innovation, experimentation, and outcome evaluation of different strategies of marketing.

Challenges to Implementation

In the initial roll out of the first 13 states, very few entities are signing up to be ENs. The issues seem to be related to cost of the start-up, limited experience in serving many disabilities, not knowing how to do it, and a perception that the program won't work or is too difficult to implement. Let's take a closer look at some of these issues.

Why Is It a Problem to be an EN? One of the largest groups of organizations that were initially presumed to be potential ENs were the 6000 community rehabilitation programs, most of which are non-profit organizations. The programs known as sheltered workshops, day programs, etc., serve hundreds of thousands of people with mental retardation, mental illness, and severe physical disabilities, many of whom are would-be Ticket holders. Most of their day program service funding comes from local or state sources or Medicaid. The majority of their clients stay in their programs for long periods of time. Most of these non-profit organizations work with very little unrestricted cash and rely heavily on block type funding that often has significant restrictions as to use.

This puts the non-profit program in a position of having to identify a way that it can support services to the Ticket holder for a period of at least 5 years (if the individual is an SSDI person and uses work incentives). Hence, the perception of many potential ENs is that they will have to have to pick their clients very carefully. Clients must:

1. Be committed to working at the Substantial Gainful Activity earnings level that will result in cash disability benefits from SSA terminating (this is a major issue);
2. Not be in need of extensive or expensive rehabilitation services;
3. Be willing to share information on a regular basis with the EN over a five-year period. (Pay stubs, etc., will require consistent contact and follow-up).

We have received comments from many local providers (Personal Communication, G. Revell, January 23, 2003) that being an EN will be too expensive and that the funds received are too delayed and insufficient to cover expenses.

Specific Shortcomings of Being an EN. Clearly, making a decision to become an EN seems almost entirely financial to many who are considering this as an option. It appears that it really is a question of risk and reward. SSA has set up a financial incentive package that can be very challenging to many programs. Programs report that it does not appear to have any direct relation to the expenditure of a) time, b) effort, or c) financial resources committed by the EN. Many programs, it would appear, are not even carefully studying the Ticket program. Because the Ticket uses outcome based funding, these programs do not want to participate (Personal Communication, L. Miller, January 17, 2003).

It would appear that the only programs that can best afford to participate as an EN are those that would probably serve the beneficiary anyway but would probably not provide extensive follow-along services over the five-year period without the funding from the Ticket.

Another issue for ENs is the very small number of individuals who are interested in full-time work as was noted in the previous section on marketing to Ticket beneficiaries. Many persons who receive the Ticket may not be interested in working and hence not act on the Ticket. This leads to the following considerations. First, in a system of this design, the only thing that could make up for the financial incentive package would be volume, and that is simply not the case with the Ticket, at least not yet. Consider these illustrations from Florida:

Example: As of February 10, 2003, Florida has over 440,000 tickets mailed-out and less than 1000 tickets assigned across the VR and the 55 ENs (SSA, 2003).

Second, the lack of a Medicaid Buy-In and the financial position of most state's basic Medicaid programs have a great impact on the ability of beneficiaries to view work as a reasonable option. The Buy-In was a pivotal piece of the legislation and the program as a whole suffers from the inability of states to take advantage of the great options it allows.

Example: Florida had a Buy-In package that had moved entirely through the system and then due to some legislative differences and the deteriorating economy, the state

completely lost it. Advocates need to spend all their energy on maintaining existing benefits, particularly the Medicaid for the working poor.

Returning to the issue of payment system, Webb (2002), in her testimony to Congress, correctly points out these issues:

"...First, ENs should be able to choose on an individual case basis as to whether they want to use the milestone/outcome plan or outcome only plan. This would better enable ENs to serve people regardless of which work incentives they might use. Second, Congress should allow some form of payment even when a beneficiary does not totally leave benefits. I believe all work is valuable and some work is better than none. We are turning people away who need to work part time simply because the payment structure does not allow us to serve them. We are also turning SSI beneficiaries away whose initial earnings potential is not above the \$1,174 break-even point. Third, the SGA level for purposes of being paid should be the same for blind and non-blind beneficiaries."

The payment system is a problem, but more so for certain ENs than others. The correct question to ask is - Which ENs can make the Ticket system work?

Vocational Rehabilitation and the Ticket Program. In some states, Vocational Rehabilitation (VR) has actively discouraged agencies from becoming ENs. SSA requires that Vocational Rehabilitation Agencies establish Memoranda of Understanding with ENs on how VR and the EN will work together under the Ticket program. Some VR agencies have set up the Memorandum of Understanding agreements in such an aggressive way that most agencies would be foolish to accept Tickets. An example of this type of agreement is where VR puts short-times frames on the EN for repayment of funds VR spends on a beneficiary who has assigned his/her Ticket to a non-VR EN and used the services of the VR agency. In a few cases, VR has also tended to be publicly very negative about the Ticket. Many local agencies that have a fee-for-service relationship with VR would rather just stay in the fee-based relationship with VR and not really examine whether the Ticket program can work. A detailed discussion of Vocational Rehabilitation and ENs is beyond the scope and focus of this paper. The intent here is mainly to note that VR does influence the response of potential ENs in the community, particularly those potential ENs who are community rehabilitation service programs with financial ties to VR. The VR influence on ENs also reinforces the point made often in this paper that a more diverse array of ENs must become available. Business is not financially dependent on VR and is therefore less likely to be influenced as an EN than a program who must weigh its involvement with the Ticket against its financial ties to a VR agency that is resistant to the Ticket program.

ENs: Why Aren't They Taking Tickets? There is also the issue of why ENs are signing up, but not taking any tickets. For example, many agencies are signing up just in case the "perfect candidate" shows up at their door. This means a person who costs nothing to serve and who is on the brink of benefits cessation. Important considerations in analyzing the reasons why ENs are hesitant to take Tickets are concerns that have been voiced regarding the payment structure of the Ticket to Work. These concerns (Wehman & Revell, 2003) include:

- The milestones-outcome and outcome performance-based funding strategies in the Ticket to Work do not pay ENs consistently at a payment level and payment schedule that reflects the costs involved in providing employment services.
- ENs assume the primary cost risk in providing services under the Ticket because SSA mainly makes back-end payments well after the early high-cost period for employment service providers. This higher cost period usually occurs during job acquisition and the first 60 days of employment.
- SSA is using a fixed goal of employment at a Substantial Gainful Activity (SGA) earnings level that results in the termination of cash benefits through SSI and SSDI. No payments are made under the Ticket to ENs when earnings are less than SGA.

A detailed analysis of the Ticket to Work payment structure is beyond the scope and focus of this paper. However, it is important to note that EN concerns with the Ticket's payment policies are a contributing factor to some ENs apparently having very limited intentions of ever accepting a Ticket. These agencies are not acting wisely; they cannot see any of the positive aspects of the Ticket program or figure out how to make it work because it is so very different from the way they are accustomed to doing business. Ultimately, this destroys the credibility of the EN and the Ticket program in general to SSA beneficiaries.

Solutions to Ticket Implementation Issues

As stated above, there have been many complaints about the effectiveness of the Ticket to Work program and how to best implement this innovative new program. The challenge is to create meaningful solutions within the available statute and regulations that are currently available. It would appear that there are several ways that a more targeted and intensive marketing plan could possibly affect the number and quality of ENs that are presently available. In this section we will present several ideas on how SSA could create a diverse array of Employment Networks.

Targeted Marketing to High Profile Companies. To date it would appear that the majority of marketing efforts to ENs has been under the heading of large scale direct flyer mail outs to a mass number of community rehabilitation programs that are on readily available mailing lists in the private and public rehabilitation sector. Additionally, face to face seminars and periodic email marketing are being conducted in states where the Ticket is now available. However, as noted in the section earlier on Marketing Principles, it may be much more efficient to identify public companies that are large and well capitalized in the business arena and that might be interested and willing to participate in as an EN in the Ticket program.

Specifically, in major cities where there are large numbers of Tickets that have been issued, it would be of value for the Program Manager or another SSA designated entity to meet one to one or in a very small groups with senior human resource personnel of corporations to inform them of the Ticket program, how it works and what benefits there may be to the corporation. While this would be time consuming, the utilization of local and state business roundtables, trade associations, and personal networks could allow for the careful identification of companies who have a history in their labor force of hiring personnel with SSI or SSDI background. More importantly, once several large companies in a state become ENs, others will

begin to seriously consider the viability of this form for their own company. There are definite spillover effects that can occur.

Hence, carefully targeting a message about the Ticket program to specific large corporations in high Ticket density areas would be one way to ameliorate the current limitations of the EN pool. It is important to recognize that many large companies, such as HealthSouth or Washington Mutual or Philip Morris, may already be hiring SSI or SSDI individuals who may have a Ticket or will be receiving a Ticket shortly. If the company can be helped through the EN establishment process, it may turn out over a five to ten year period to be a very value-added proposition for the company. Certainly, a large corporation that is already going to hire the individual anyway would have an incentive to take the Ticket and the subsequent SSA funds that would follow with successful employment.

Employers may well become the dominant numbers of ENs, that is, employers without other organizations. In fact, one could argue that this is the primary group that most marketing efforts should be directed toward because they have the most to benefit financially from the Ticket To Work Program. Utilizing community rehabilitation programs, One Stop Centers, and other intermediaries is an inefficient use of the Ticket. One only has to consider that every SSI or SSDI beneficiary who surrenders his or her Ticket to a company that is a certified EN functionally serves as a potential five-year tax credit for that company. In the case of Ticket holders, of course, they must earn beyond the SGA and get to a zero cash benefit. Admittedly, there are certifications of wage statements that are necessary in other forms that need to be filled out in order to get appropriate reimbursement. Once this process is established, like any other tax credit type program, the long-term benefits to employers could be substantial.

Targeting Staffing Companies. A further modification of the aforementioned business-targeting plan would be to especially focus on supplemental staffing companies who have an especially large incentive to become an EN. As will be noted later in this paper through an extensive Question and Answer section and small case study, it is very clear that supplemental staffing companies are in a uniquely positive situation when it comes to making the Ticket program work. Remember - these are corporations that are highly skilled in screening, training, and placing personnel. Their profits depend on how well they do this and, therefore, accepting individuals with the Ticket who are going to be placed into other companies for which the supplemental staffing company receives a fee makes it advantageous for all involved. The opportunity for sharing fees, reducing paperwork, etc., are all available. Webb (2002), in her pilot work in Arizona, has already shown this to be the case. Manpower, Inc. has also recognized this with its recently approved EN status and pilot plans for implementation.

Concentrated Efforts with Trade Associations. Clearly, meeting with state Chambers of Commerce, the U. S. Chamber of Commerce, the National Federation of Independent Business, the National Hotel and Restaurant Association and other trade associations would be another obvious and logical way to target the business community. The marketing strategy here would be to utilize these associations as major marketing agents to smaller companies that are in the \$100 million to \$1 billion a year revenue area and help explain to them how the Ticket program might work. Companies in this revenue category tend to be growing more rapidly in a percentage basis than Fortune 100 companies and often their organic growth (meaning greater

revenues on the basis of expanded product sales, not such through acquisition of other companies) results in a need for greater labor at different points in time, depending, of course on the business cycle. Identifying these companies can be difficult, and gaining their trust, equally difficult.

Therefore the use of local and state Chambers of Commerce and trade associations as agents to help participate in this process, possibly even in a consortium, would be another approach. It is very common for many businesses in different industries to establish consortiums and cartel-like arrangements for greater buying power. There is no reason that this same approach could not be used in sharing the number of Tickets that might be surrendered, but it does require one association to help blend perhaps several companies together.

As an example of this, consider the possibility if Office Max, Staples, Inc., and several larger independent office supply groups within a given region all deciding to have one entry point for Ticket holders and share the cost of administering the program in a given part of the state. This type of arrangement would allow for sharing of the administrative costs and also expanding the large base of Ticket holders that might come in and be distributed in any one company.

Descriptive Use of the Internet. There is no question that the Internet and targeted email could be a very powerful way to elevate the awareness of the Ticket program. However, without carefully targeted mailings, this is also a wasted effort and highly inefficient. Consequently, it would make the most sense to identify specific links such as www.careerbuilders.com or www.hotjobs.com or any of a number of employment links that are available. The Internet is an enormously positive way of being efficient, but the Program Manager or the SSA designated entity needs to much more fully develop an EN web site. At this point, the Internet site is instructive, but it is not a marketing tool. **The web site needs to be a major effort at selling why being an EN has value, how different companies and ENs are making it work, and the positive value that it provides to the community via a societal marketing philosophy, as well as to the company or EN bottom line.**

There needs to be a careful analysis of the positive aspects of being an EN and then this should be presented on a dynamic continually changing web site that provides attractive case study illustrations and linkages. At this point in the infancy of the Ticket to Work program implementation, targeted marketing and the use of the Internet with specific efforts at trying to segment effort has been very limited. There is little doubt that if continued effort is made to market to community rehabilitation programs, the growth of ENs taking large numbers of Tickets will be very limited. The incentive for local community rehabilitation programs is not strong since many of these programs do not have as their primary goal immediate employment. It is important to recognize that is exactly what the Ticket is all about - employment. Therefore, a primary criterion for an EN should be that it has the capacity to deliver on sustained employment. Programs that do not have a sufficient track record of doing that will probably fail because they do not have the incentive or capacity to support sustained employment.

Creating Meaningful Networks. The whole network idea seems to have eluded many people, despite the fact that the very name of the entity is Employment Network. Yet blending

of different organizational entities as alluded to earlier with trade associations as one EN could be very powerful, indeed. This example was noted earlier in the discussion of Bank of America and Charlotte, N. C. Public Schools teaming up together. Many people may feel that there is not enough money to share, and it is true that networking can be a cumbersome process and has not been the typical way of doing business, at least in the community rehabilitation sector. However, as noted earlier in the discussion of consortiums and cartels in business, working together and teaming up is often the way the business sector works.

Clearly, one argument for utilization of networks is that if Ticket holders are not well qualified for positions within a company, which is often going to be the case, then having a partner who is involved in the preparation of vocational skills and sharing in the Ticket administration responsibilities may be useful. One recent comment from an individual who has been administrating an EN within a corporate setting noted

"Yes, we are an approved employment network for Ticket to Work participants through the SSA program. I have had significant time watching the development of the SSA initiative...."

We are "playing" with it minimally right now and not finding the participants to be of appropriate levels for return to work. I can discuss this in greater detail And we will be meeting with SSA in the near future to discuss in more depth" (author anonymous, 2003).

In this particular situation, this corporation would have appreciated having a partner that was involved in the recruiting, screening, and training aspect before the actual placement in employment. The creation of networks that could lead into long-term strategic relationships and partnerships would seem to be one solution to long-term marketing impact nationwide.

Development of Self-Employment ENs.⁶ The hesitancy of ENs to use the Ticket is magnified when a person with a disability seeks self-employment. The absence of cost reimbursement, coupled with the fact that self-employment is an emerging technique for people with significant disabilities, increases programmatic fear and hesitancy to encourage personal choice. The Ticket also appears flawed in two critical ways when addressing business ownership. The first issue concerns the fact that the Social Security Administration will reimburse ENs only for countable net earnings of SGA or higher. Therefore, ENs are penalized when individuals wisely put money back into their business for stability and growth. The individual business owner may also feel pressure by the EN to take increased net wages in order for the EN to capture milestone payments, but such short-term thinking could jeopardize the long-term health and survival of the enterprise (Marsha Katz, Personal Communication, January 29, 2003).

The other related issue concerns the use of the Subsidy work incentive that allows wage employees to report decreased countable earnings if they receive or purchase work supports. Evidence of a subsidy applied against the gross earnings of a wage employee is used to delay SGA, but it does not impact the EN's payments based on gross earnings at or above SGA. It

⁶ We are indebted to Cary Griffin for his assistance in this section on self-employment

appears that Subsidy cannot be applied to net self-employment earnings; therefore, benefits cannot be protected (Griffin & Hammis, In Press).

The larger ENs though may be able to take these risks and also help people with disabilities incubate small enterprises. Large companies, not-for-profits, school districts, and other EN configurations might use self-employment candidates in their supply chain, just as many companies now use minority-owned businesses. For instance, consider the vision of Microsoft becoming an EN. They might match a potential small business owner's interest in children with the company's need for childcare for their employees. Microsoft could house the day care center and treat it as any other contractor. The location of the childcare business within Microsoft would guarantee a steady flow of customers. Microsoft in essence gets a needed service, receives Ticket payments, and essentially guarantees the success of the enterprise. The scale could also be easily increased by Microsoft putting these day care centers in all their buildings owned by one Ticket recipient or by many who also shared the interest in childcare.

In another vision of this use of the Ticket program, Office Depot might create similar opportunities by matching Ticket holders to each of their stores' internal Copy Shops across the country. Office Depot already outfits copy shops in many of its stores, so it uses the existing infrastructure by, in essence, giving it to the Ticket holder who then runs the copy shop as an independent contractor. The Ticket offsets training and some of the equipment, and profits from sales are used to reimburse the initial Office Depot investment. In effect, Office Depot receives a subsidy from SSA to establish a value-added customer service in the form of a privately owned, but co-located (business within a business) copy center.

The applications are endless. A Ticket holder with an interest in baking might be supported by a school district that functions as an EN. The school uses the Ticket for baking equipment and then guarantees it will buy cookies for all its schools from the baker. The school thereby insures the success of the baker and the baker has a steady income that allows them to concentrate on product quality and growing the business.

The above mentioned self-employment disincentives in Ticket to Work are considerable, even to large, wealthy ENs. In the case of smaller, community rehabilitation programs, these disincentives and the lack of personnel knowledgeable in the many facets of self-employment for people with disabilities will contribute to the slow adoption of Ticket as a viable incentive to productive work (Griffin & Hammis, In Press).

Branding. Johnson (2002) notes the incredible power of branding in the overall marketing mix. He indicates that a brand is very different than the actual product. A product, as we noted earlier, is something that is produced to function in existing reality. A brand, however, has meaning **beyond** functionality and exists in people's minds. Think of the swoosh symbol for Nike. What feelings and associations does that convey beyond the mere symbol? What should happen with any new program is that it needs to be branded positively in such a way that it communicates to many people a positive image and, more importantly, something that they would like to be part of. In the current marketing literature, the Program Manager has created a web site called www.yourtickettowork.com. That web site bears a clever name and gives a suggestion that perhaps using the term 'ticket' and the term 'work', a highly creative public

relations firm like Fleischmann-Hilliard could come up with a physical symbol or graphic to go with a name or an expression that would help create more of a 'buzz' about the entire Ticket to Work Program. Presently, there is a great deal of confusion about what the Ticket to Work Program is and is not, whom it can serve and whom it cannot. The Ticket program can appear to many to be just another Federal program that is bureaucratic in nature.

The goals of the Ticket program are not representative of a limited public initiative bound by limits imposed by federal bureaucracy. The Ticket is about work, improving quality of life and economic independence, informed choice, and protected health care. The perception and understanding of the Ticket program needs to be elevated for both Ticket holders and potential ENs. Strong branding like "If you have the ticket--We have the work!" done thousands of times under different marketing media might be one way that ENs could market their services to ticket holders. The "Working for Wellness" theme of the Oklahoma KEYS project example described earlier represents a very targeted branding message for a specific population. Clearly, the Ticket program needs a specific identity that breaks it away from other heavily subsidized federal employment programs provided under different rehabilitation statutes. There is not at this point any clear brand or logo associated with the Ticket to Work Program. This would be an important solution to overcoming the earlier barriers that were mentioned.

Saturation Advertising in Niche Markets. Earlier in this paper, the importance of identifying markets was discussed where there are a high number of ticket holders that ENs could focus upon recruiting into their program. However, it was noted also in the marketing principles section that advertising through radio, television, newspaper, or other less expensive medium needs to be done in a highly saturated fashion, meaning repeatedly over concentrated periods of time. When one considers how General Motors sells zero percent financing for \$35,000 to \$45,000 sports utility vehicles, how long-distance telephone carriers sell services, or timeshare vacation marketers approach potential buyers through telemarketing, it is not hard to see that powerful amounts of repetition (admittedly to an obnoxious level at times) is an essential part of getting a response. In order to fully implement the Ticket in a limited number of target areas and be very successful, saturated advertising would appear to be essential. This is especially true in trying to reach beneficiaries but may also be true in terms of recruiting non-traditional ENs such as Community Colleges and businesses that might normally not have considered participating.

To see better how these ideas and the potential for business sector ENs might play out if better marketed, we conducted a case study of Manpower, Inc. and its approach to becoming an EN. The following is a highly informative Q and A discussion on how Manpower, Inc. has begun to develop as an EN. It is a look at how a major staffing corporation went about the thought process in planning and implementing being an EN. Manpower's plan is to develop a structure that will support a continuum of temporary work assignments leading into their temp-to-perm positions. The senior author asked the questions with several management personnel from Manpower, Inc. providing the responses and reviews.

Case Study: Manpower, Inc.: Becoming An EN⁷

⁷ This information was derived from interviews and discussions with regional and area managers and other key staff at Manpower, Inc.

Question: When did Manpower first start thinking about being an EN?

The first time was back in 2001 at a meeting with SSA held at Suntrust Bank. Manpower was asked to present to SSA. This started Millie Hewett, District Manager in Richmond Virginia, to start thinking about the possibilities. The second time was at a meeting at VCU with Howard Green and Paul Wehman from VCU, and Don Johnston, General Manager and Senior Vice President of Manpower, Southeast Region, and Millie Hewett, Area Sales Manager from Richmond, Virginia on October 27,2002. Don is located in Atlanta. During the meeting VCU presented the idea of Manpower being very aggressive in getting out and becoming an EN. Don Johnston was excited about the possibilities of doing this in his region. At the same time TechReach Director, Branka Minic of Manpower was working with other agencies studying whether Manpower should be an EN. The idea to become an EN came almost at the same time from several of our offices and through our corporate contacts and national partnerships. TechReach is Manpower's nationwide workforce development program focused on creating opportunities for unemployed and underemployed, and includes initiatives related to individuals with disabilities. Subsequently in November there were two conference calls between the VCU personnel and Millie Hewett, Branka Minic, and Don Johnston of Manpower to discuss the issues involved with becoming an EN.

Question: What were some of the initial questions and concerns, which resulted from your discussions?

1. One of things we did once we decided we wanted to proceed was to look at the application to be an EN. Some of the concerns were about the document itself (application) It appeared that the application was written for service providers or public sector. For example one concern was about confidentiality which would require Manpower offices to have special systems in place to protect and safeguard the confidentiality of personal information about beneficiaries. Another question was a statement in the application that required coordinating and delivering vocational rehabilitation services and other support services which is not one of our core businesses. We had to go back to Maximus to get some clarification on these questions. It was during our discussions with Maximus that we realized that as long as we had the systems and HR functions in place we were ok and didn't have to do anything different. We learned that we didn't have to offer rehab service but could partner with the rehabilitation agency.
2. Another question corporate headquarters had was regarding the statement in the application about employing staff and or utilizing providers who are qualified, certified or licensed in assisting beneficiaries with disabilities. The answer was that Manpower was not required to have any certified or licensed staff in addition to our regular employees.
3. Another concern was the statement that we had to have agreements with other ENs and State Rehabilitation Agencies- It seemed we were required to have these agreements. After talking with Maximus we learned that wasn't true. We could decide to have agreement and if we did then we had to send the agreement to Maximus.

4. The record-keeping piece was another area of concern. Similar to the welfare to work and WOTC we needed to decide if we were going to track this with our own staff or contract out for that service. The good thing about the ticket is that SSA assumes the responsibility to be the administrator.

Question: Why does Manpower want to do this?

First we are already doing it. It is just not connected to the Ticket to Work program. We are very conscious today that people still say it is right thing to do. It is not the right thing to do. We have been doing this for 12 years and it is a business thing to do. Also, we see there is a revenue stream tied to it. We can be on the cutting edge. Manpower, as a Fortune 500 company can use this as marketing tool.

Question: Did the question of how this will impact the bottom line come into the discussions with corporate headquarters?

Absolutely, Cost efficiency was an issue! One thing we did was look at Virginia. We have 43 manpower locations (offices). If only 25 of these offices were successful and made 10 placements that would be account for 250 placements. If they all qualified for the total payment that would add 1 million dollars to our bottom line. That is a substantial amount of money.

Question: Did you discuss who else needs to be involved with this internal and external from Manpower

We will look to VCU-RRTC to help us with training and resources and Manpower has great confidence in you. We have great relationships with State Vocational Rehabilitation programs in all of the pilot states; also our relationships with our business networks are good. We can call on these resources for training & support. This was a selling point to our corporate headquarters. It was nice having the relationships established and we didn't have to start from scratch.

Question: How about discussions on selecting specific disability groups to target for the ticket.

In early discussion there were conversations that Manpower should target certain disabilities. It was discussed that we should work with certain groups that we are comfortable with or our staff would be comfortable with serving. I (Millie) was adamant that this was not the way to go. If we were going to be diverse we will need to embrace all people. If we have jobs and a person comes to us no matter what the disability we should place him. If we don't think we can place him then it would be unfair to take the ticket. But we shouldn't base that on the disability but the job market and type of jobs in the community. We should be referring them to other ENs who may be better able to serve that person. This is where the partnerships will be helpful. We don't want to just take tickets and then be unsuccessful. We want to make sure we can assist the person. We make decisions every day about helping people or not, so this is not different from our normal operations. The decision will be made on the jobs and the candidate and not the disability.

Question: Do you think you will partner with other ENs?

We have talked about it but we haven't made a decision. We already have some nice relationships but that may evolve as we go forward. That may be a part of our training rollout. We may find that in one city we may need to partner and in another area we don't.

Question: Do you think you will offer incentives to the customer (end users) ticket holders, and other ENs?

Again we see the need to do this but we may want to see how the pilot goes. I am thinking that the person may require an incentive to surrender his ticket. At this time in our proposal (application) we don't list any incentives.

There is one thing I want to offer here is that the process for approval to be an EN should be quicker. I looked at the web site yesterday and we were not listed. However, the first one listed on the site said they were splitting the ticket 75% to the ticket holder and the EN keeps 25%.

Question: Where is Manpower in the process of being an EN?

Maximus had requested additional information almost a month ago and we still are waiting to hear about the decision. I called Maximus yesterday they said they hadn't received all of the information so we sent it again. I went through four people before I could find out what was happening with the application. So I see some red tape creeping up. When I talked to Maximus in Nov they said it shouldn't take but another week or two. It has been a month or more.

Question: How do you think your staff will react to this in the pilot states?

Our corporate directions this year is to pursue additional revenue streams, develop additional workforce development strategies and make sure our staff are in the mainstream. Corporate is asking us to develop stronger ties with education institutions. The new direction is from the top and Don Johnston, the Regional V. P. for the Southeast part of the U. S., sees this as a key part of the objectives in the Southeast region.

Question: What are the next steps?

We are waiting to get the approval from SSA and Maximus before we do training and marketing. Also, we are waiting for the Performance standards from Maximus.

The big education piece is to make sure our staff understands that the surrender of the ticket is voluntary. This is critical. We don't want to just market for tickets. We need to do additional awareness training.

We want to have a marketing program in place to let the people know what we offer and what training opportunities we offer.

We will have one key person in each office responsible for this program. Once approved we will do some web site modification and announcements.

Question: What are the risks?

It is pretty risk free except for training & education of our staff and making sure that they understand that we will do what we do best. We will be measuring the number of tickets and make sure we are being successful. There are 2 things in this for Manpower. The first is to increase revenue and the second is it gives us another pool of candidates.

The biggest obstacles we see are:

- a) Time management issues - Some of the staff say this will take us more time and the reporting will be too much. However, we hope this will be seamless with Maximus since they are doing a lot of the work;
- b) The issue of working with the customer on benefits planning. We will need help on this and make sure our staff understands that this is not something we do. We hope we can count on the BPAO's and VCU's training and information to help us, and
- c) The other area is at the end of the day or pilot we don't want to learn that we have worked and placed a lot of people however they had given their ticket to Department of Rehabilitative Services but we have employed them all. We will need to look at the partnership with the Department of Rehabilitative Services.

Manpower, Inc.: Case Study Current Status Report

Manpower's application to be an EN was approved in January 2003, and it has been notified that they are officially an EN under the Ticket to Work program. They have decided to implement the program first as a pilot in four states: Virginia, Florida, Alabama, and Mississippi. These state were carefully selected because of the strength and experience of their management teams in those states, the number of ticket holders in those states and the client relationships Manpower has in those markets.

The next steps for implementation will be to prepare a communication plan to educate the Manpower organization on this program. Further they will be going through the training available for new ENs. Also they hope to incorporate this program into their standard intake process. They are then going to work on marketing plans for candidates, clients and partners. Necessary reports will be prepared to closely monitor the results of the program. It is their expectation for the program to be very successful and therefore, is tentatively targeting national rollout for later in 2003.

VI. Recommendations

We believe that the implementation of a meaningful marketing plan for attracting SSA beneficiaries into the Ticket program and, at the same time, matching them with appropriate ENs will need to be built from a local level initially. We think that the concept of a national marketing initiative, which presumes to heavily market in **ALL** Ticket states to **ALL** SSA

beneficiaries and potential ENs equally, will be a failed strategy. In fact, when one looks at other similar efforts and innovations, such as the supported employment programs in the 1980s and early 1990s, it is clear that systems change states were funded for innovative practice with special concentration on local programs that were responsive to change (Mank and Revell, 2001). The Ticket to Work is an innovation, a new approach that may or may not be statutorily flawed; however, at this point it is probably safe to say that not enough time has elapsed to evaluate whether all strategies are unable to work.

The systematic building of strong ENs that have the capacity to target select SSA beneficiaries who are Ticket holders and want to work is the first step in strengthening the Ticket program. Clearly, a major marketing initiative coming from SSA and other federal agencies would be efforts to specifically fund collaborative partnerships, corporations, and other interested entities in demonstrating the best ways that some of the strategies presented in this paper might be effectively implemented.

For example, it would make much greater sense to pair together, as major illustrations of how ENs and EN consortia can be built, Motorola Corporation with the College of DuPage Community College (two very large entities in the western suburbs of Chicago), J. W. Marriott with Montgomery County Schools, J. C. Penney and the Dallas County Public Schools or a local community college. Furthermore, if in fact the supplemental staffing model is as viable as we believe, it will be important for Social Security and other federal agencies to promote, support, and disseminate the Manpower efforts that are made in helping to implement the Ticket successfully. The success of the Ticket will be measured not only by the number of Tickets that are actually acted upon, but also by the number of competent and effective ENs that emerge throughout the country and help create sufficient competition for Ticket holders to have real choices.

We should not assume that ENs will be the same as local rehabilitation programs. Many will probably be new entities from those that the federal government has utilized in the past for employment related services for individuals with a disability. Therefore, it will be crucial to seed the Ticket marketing program with additional federal agency funds and support to give it a true chance to get started. Highly targeted marketing is a key to helping ENs emerge as a focused source of planning, education, and employment support for Ticket holders interested in going to work.

As has been noted throughout this paper, the true hidden strength of the Ticket program lies within the private sector. Once companies like Marriott, Pizza Hut, etc., have fully examined the Ticket program, there could be an incredible upsurge in quality ENs. They could provide rehabilitation services themselves and accept tickets, greatly reducing the role of state VR programs. Although at present VR agencies do not appear to have EN agreements in place with large businesses, VR agencies are starting to explore establishing partnerships with big companies to work collaboratively on Ticket. The Delaware VR agency, for example, has expressed interest in potentially partnering with the Discover Card Company in its state, which offers the Boost Program, a training program that assists individuals with a disability learn the skills needed to be successful at Discover Card (Grant Revell, Personal Communication, January 22, 2003). The Vermont Division of Vocational Rehabilitation has established an EN partnership

agreement with the Vermont Association of Business, Industry, and Rehabilitation (VABIR) to build and strengthen partnership arrangements with business and industry in Vermont related to the Ticket to Work (Vermont Division of Vocational Rehabilitation, 2002). The Ticket is an excellent match for the Manpowers, Kelly Services, or even Snellings of the world. These companies understand placement, and they would think the payment mechanism was attractive. They will accept the fees from the companies they serve plus access the Ticket payment, which is an excellent business planning and profit maximization strategy.

The following are 13 specific recommendations targeted to improving the overall Ticket to Work marketing effort.

Specific Recommendations

1. Create a major Marketing initiative within the Ticket to Work program that would implement model demonstration programs, targeted marketing, business recruitment coordination, and evaluation of outcome. Enlist the assistance of marketing specialists to help package and coordinate the Marketing initiative.
2. Utilize existing resources that are working closely with the business community. For example, there are current initiatives in place with the National Chamber of Commerce and with Business Leadership Networks that could incorporate efforts to expand enrollment of businesses as ENs.
3. In segmenting the market of Ticket holders, work closely with minority communities, especially African Americans and Hispanic American communities, to market the Ticket to Work program as a way to enter the nation's labor force by using the appropriate Chamber of Commerce entities and also selected based organizations.
4. Promote use of the Small Business Administration and business trade associations such as the Society for Human Resource Management, and National Federation of Independent Business as a way to promote the Ticket.
5. Establish Model Demonstration projects that show the power of private sector entities serving as ENs in the Ticket to Work program.
6. Establish Model Demonstration projects would show the power of blending ENs from the private sector and public sector.
7. Invest heavily in a Ticket to Work Internet site that is linked to at least 20 major business and trade associations, both nationally and in each state where the Ticket program has been established.
8. Meet with at least 100 Fortune 1000 or larger corporations who would be willing to consider being an EN in high-density Ticket areas of the United States.
9. Target specific Ticket holders for targeted marketing to include email, direct mail, and use of radio and television in neighborhood communities where these beneficiaries live.
10. Establish partnerships at the community level that combine information on Benefits Planning, EN options, work-related supports, and the Ticket to Work in outreach efforts to beneficiaries.
11. Fund demonstration efforts that test different partnership arrangements to determine how best to conduct outreach on the Ticket to Work to people who, for example, are experiencing different primary disabilities, are youth/young adults transitioning from

secondary and post secondary education and training settings, and/or are from different ethnic backgrounds.

12. Establish a national Technical Assistance program that would collect and disseminate information on promising practices in establishing EN partnership arrangements and marketing the Ticket to Work to beneficiaries and that would also provide direct technical assistance in the areas of marketing to ENs and marketing to beneficiaries.
13. Require that any EN who is marketing its services on an interstate basis offer a Toll-free telephone line for use by Ticket holders.
14. Cultivate the Project with Industry programs and One Stop Centers as key community hubs for outreach to Ticket holders and linkages to ENs (including employers), particularly those One Stops that have the newly established Program Navigator positions. Projects with Industry is a large established program in Vocational Rehabilitation where there are already large employer networks established. Maximize the use of the Office of Disability Employment Policy and the Employment and Training Administration within the Department of Labor to promote marketing of the Ticket through the One Stops.
15. Provide research and evaluation for marketing efforts and optimal market segmentation for appropriate Ticket holders to be targeted for marketing activities.

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