

Are We Leaving Money on the Table? How Partnership Plus May Boost the Fiscal Stability of Inclusive Higher Education Programs

By Russ Thelin

Fiscal sustainability is a critical aspect to maintain quality and consistency for students with intellectual and/or developmental disability (IDD) who are accessing higher education. Colleges and universities use multiple means to meet their program costs, including state and federal funds, foundation monies, Medicaid waivers, vocational rehabilitation (VR) funds, and scholarships.

One underused financial resource is the Partnership Plus model provided under the Ticket to Work program of the Social Security Administration (SSA). Partnership Plus is a structured services provision model between VR and other entities to assist SSA beneficiaries to employment, with compensation from SSA provided to each.

This brief will describe what Partnership Plus is, explain how it works, and illustrate how institutions of higher education (IHEs) already partnering with VR could build upon this partnership to gain program income.

The Ticket to Work and Work Incentives Improvement Act of 1999 increased the options for individuals with disabilities who wish to return to work. Commonly referred to as “the Ticket,” the regulatory language supporting this legislation has undergone several revisions.

The 2008 Ticket regulations included provisions to create financial incentives for state VR agencies and approved Employment Networks (ENs) to work collaboratively to assist beneficiaries to achieve long-term employment success with compensation for doing so. Known as Partnership Plus, this financial incentives model allows VR and an EN to share the compensation from SSA for employment of beneficiaries as they reach successful levels of employment. As beneficiaries achieve particular milestones toward Substantial Gainful Activity¹ (SGA) and sustained employment at the level of SGA, milestone and outcome payments are provided to the participating Partnership Plus entities.

Employment Network status can be given to organizations that meet and sustain Social Security definitions and standards. An EN may be any public or private entity, so long as the EN is qualified to assume responsibility for coordination with VR, services delivery, or other support services to beneficiaries to help them achieve their employment goals. An EN may be an individual, agency, organization, business, or consortium.. Certain entities, like State Vocational Rehabilitation (VR) agencies and Department of Labor American Job Centers (formerly known as One Stop career centers), are automatically qualified as ENs under the Ticket Program. Federal agencies are precluded from becoming ENs and beneficiaries who may be qualified and approved as ENs, are precluded from acting as their own EN.

Suggested steps in becoming an EN

1. Talk within your IHE and then others within your institution to determine if it is in your best programmatic and financial interest to become an EN.
2. Talk to your VR agency regarding your IHE becoming an EN, and engaging in a Partnership Plus agreement with them.
3. Review and complete the SSA EN Request for Quotation (www.ssa.gov/work/enrfq.html).
4. Work with SSA to work through to receive determination of suitability from them for designation as an EN.
5. Have appropriate staff complete no-cost SSA provided training on operating as an EN. (<https://yourtickettowork.ssa.gov/training-and-events/index.html>)
6. Partner with your VR agency in establishing a Partnership Plus Agreement. A link to a sample agreement can be found in the resources section at the end of this brief.

¹Substantial Gainful Activity is the amount of monthly earnings SSA considers sufficient to warrant provision of outcome payments under Partnership Plus. This amount is updated annually, and consists of two SGA amounts (one each for blind and non-blind VR recipients). The 2018 monthly SGA amounts are \$1,970 for blind recipients and \$1,180 for non-blind. SGA amounts for subsequent years can be found at www.ssa.gov.

The Partnership Plus model is a largely overlooked opportunity between VR agencies and the ever-increasing number of IHEs hosting inclusive programs across the country. Besides being a viable method to assist individuals with IDD with meaningful employment opportunities through collaborative service provision expected under the Workforce Innovation and Opportunity Act (WIOA), it further provides program income for both parties via a Partnership Plus agreement.

HOW DOES PARTNERSHIP PLUS WORK?

SSA reimbursement for beneficiaries is provided when milestone standards of achievement toward SGA level employment are met, and then as outcome payments when employment at SGA is sustained over a period of time.. Milestone reimbursements are provided as Phase 1 or Phase 2 payments. Outcome payments are reimbursed on a monthly basis as SGA is sustained for 3-5 years, depending on the beneficiary receiving SSI or SSDI. The column Amounts (per individual) in Table 1 (below) provides current maximums for each of the milestone and outcome payments under Ticket to Work.

Under Partnership Plus with VR and IHE as an EN working in agreement, compensation to partners is determined between VR and the EN by a formal agreement and can be split or shared in any way they mutually agree.

It is not uncommon for VR to receive Phase 1 milestone payments, with Phase 2 and outcome payments going to the EN. However, payments through Partnership Plus can be established in whatever way the two participating programs determine in their agreement.

Table 1 shows one example of the breakdown of these milestone and outcome payments, their current amounts (annually updated by SSA), and the rationale behind payments to each particular partner. Links to current and future milestone and outcome payment amounts are noted in the resources section at the end of this brief.

Figure 1 shows what each entity does in their Partnership Plus relationship. How the Vocational Rehabilitation agency and IHE program as an Employment Network determine their agreement will result in changes to the amounts shown.

CONCLUSION

When IHE programs become an EN and collaborate with VR, Partnership Plus creates a mechanism for both entities to receive compensatory program income for services that each is already providing. There are requirements to become an EN and to sustain that status, and IHE program leadership and other decisionmakers at the college or university should look closely at these requirements to determine if becoming an EN is right for their IHE.

Table 1: Partnership Plus Example

Milestone	Milestone Recipient	Amounts (per individual)	Rationale	Definition/Standard
Phase 1	Vocational Rehabilitation	\$15,203.15 (Average cost per claim for FY 2016)*	VR agency provided the pre-employment and placement services leading to 90 days of successful employment	90 or more days employment
Phase 2	Inclusive Higher Education as an as Employment Network	SSDI: \$4,653 (\$423/month up to 11 months) SSI: \$4,356 (\$242/month up to 18 months)	EN ensures continued employment and earnings following VR successful employment closure	Earnings at SGA (currently \$1,180/mo., \$1,950 for blind/visually impaired VR clients)
Outcome	Inclusive Higher Education as as Employment Network	SSDI: \$15,228* (\$423/month up to 36 months) SSI: \$14,520* \$242/month up to 60 months)	(2017 rate, adjusted annually)	
Totals	VR Inclusive Higher Education as an Employment Network	\$15,203.15 SSDI: Up to \$19,740* SSI: Up to \$18,876*	Average 2016 Claim (2017 rate, adjusted annually)	

*Note: Ticket to Work is a dynamic program with variables that change to meet local agreements. This table is only a sample SSA Partnership Plus compensatory payment amount agreement; amounts are shown for illustrative purposes only. Actual results will vary depending on how the IHE and VR agency determine and agree on how payments will be shared.

Figure 1: IHE as an Employment Network



RESOURCES

Ticket to Work General Info

<https://yourtickettowork.ssa.gov/index.html>

Partnership Plus General Info

<https://yourtickettowork.ssa.gov/program-operations/partnership-plus.html>

Milestone Payment Fundamentals

<https://yourtickettowork.ssa.gov/employment-networks/milestone-outcome-system.html>

Outcome Payment Fundamentals

<https://yourtickettowork.ssa.gov/employment-networks/outcome-payments.html>

REFERENCES

1. Code of Federal Regulation (CFR) 20 Part 411, issued May 20, 2008

INSIGHT, Issue No. 39, 2018

INSIGHT is a publication of Think College, a project of the Institute for Community Inclusion at the University of Massachusetts Boston, funded by a grant from the Office of Postsecondary Education (Grant No. P407B100002). The opinions contained in this document are those of the grantee and do not necessarily reflect those of the funder.

Recommended citation for this brief: Thelin, R. (2018). *Are We Leaving Money on the Table? How Partnership Plus May Boost the Fiscal Stability of Inclusive Higher Education Programs*. Think College Insight Brief, Issue No. 39. Boston, MA: University of Massachusetts Boston, Institute for Community Inclusion.



ABOUT THE AUTHOR

Russ Thelin is a senior policy fellow at the Institute for Community Inclusion (ICI). He has 28+ years of experience working on the inclusion of individuals with disabilities in the workplace. This includes providing clinical counseling, executive leadership, and technical assistance within vocational rehabilitation (VR) and other organizations.



Before joining the ICI, Russ was the executive director of the Utah State Office of Rehabilitation, where he worked for 25 years across a range of roles, including VR counselor, district and regional director, administrative services director, and division director. He is a nationally certified rehabilitation counselor and Utah licensed vocational rehabilitation counselor.

Contact Russ: Russ.Thelin@umb.edu