EN ESSENTIALS TRANSCRIPT

From Intake to IWP, Building Relationships One Individual at a Time

November 13, 2024

Derek Shields: Welcome to today's EN Essentials session, *From Intake to IWP, Building Relationships One Individual at a Time*. My name is Derek Shields, and I will be serving as today's moderator. If this is your first EN Essentials session, welcome. And please know that we design the content for individuals seeking to enhance their Employment Network performance and compliance. We look at both areas, and that's around Ticket Program policies and procedures. The learning events build upon the initial EN Foundations training and feature new resources, best practices and strategies, and other helpful information and resources.

Today, we're pleased to be able to introduce a brand-new tool for ENs to use when conducting a Ticketholder intake discussion. Along with this new resource, you'll gain tips and creative ideas from CareerSource Central Florida's EN staff who are with us, as they share how they engage with prospective clients, inform them about the purpose of the Ticket to Work Program and establish a committed, two-way relationship right from the start. This is an exciting area of the program, and I really enjoyed preparing for this session with today's guests. Before we get into the presentations, let's now review our agenda and a few housekeeping items. Next slide, please.

As I said, we'll start with an overview of some of the logistics and introduce our speakers. Then our first presenter will cover the new resource I just mentioned, the Ticket Program's new Intake Guidance and Worksheet. Then we'll have a presentation from our guests from CareerSource Central Florida, focusing on their intake process. And then we'll have a small panel for about 15 minutes, where we'll bring our guests together, along with our presenter. And then we'll close out with our customary Q&A session. Next slide, please.

And now for those logistics. First, TPM is recording and capturing a transcript from today's meeting, and we'll make this available on the Your Ticket to Work website under the Training and Events area with our EN Essentials content. We do encourage you to ask questions and participate. Please feel free to ask those through the MS Teams chat feature. Feel free to send us questions or comments via email, if you prefer, at ENOperations@yourtickettowork.ssa.gov. We'll route them to the appropriate individuals for response. For questions, again, please feel free to submit those. We do ask that you refrain from answering questions proposed by others in the chat that are especially intended for TPM or SSA staff.

Next, for closed captioning: it is available, and you can access that through the MS Teams application, or by using the closed caption link that's provided in the GovDelivery email announcement or posted in chat. To turn on closed captions in MS Teams, you can go to the three ellipses at the top of the MS Teams window. Click on More, scroll down that list, and select Language and Speech, and then click on Turn on Live Captions. Or when using the link option, paste that link into a separate browser, and it will open a separate window to view those closed captions.

And finally, per the Ticket Program Agreement, Part 3, Section 11, Subsection I, please recall that EN staff are not permitted to record this meeting nor capture the transcript. Okay. Next slide, please.

As I mentioned, I'm the moderator for today's session, and I'm pleased to be joined by Ana Morales, the EN Development and Training Manager for the Ticket Program Manager. Ana is going to review the new Intake Guidance and Worksheet. But before we do that, I'd also like to introduce our guests. Next slide, please.

As I mentioned, we're so delighted to be joined by two individuals from the CareerSource Central Florida Employment Network. We have with us today, Angela Smoak Hunter. Angela is a Program Manager at CSCF, and we also have Janeé Olds with us. Janeé is the Director of Workforce Special Projects, and we see them on screen now. Thank you both for being with us. Prior to your presentation, we'll turn to Ana Morales. If we can move forward to the next slide.

It's my pleasure to hand this over to Ana to provide a presentation on the new Intake Guidance and Worksheet. Ana?

Ana Morales: Thank you, Derek, and good afternoon, everybody. I'm going to cover some points about our new Intake Guidance and Worksheet. So, if we can move to the next slide, please.

This is a resource that’s new and improved and is already posted on the Your Ticket to Work website for everybody to use. This new tool offers in-depth information for conducting and documenting a Ticketholder's intake discussion, which is also known as a one-on-one individualized discussion. It provides instructions on how to meet the Individual Work Plan requirements, and it provides a fillable intake form for the worksheet. So we wanted to make sure that this resource is available to everybody and is easy to use. So the fillable forms – the fillable fields, I'm sorry, are now included. And just to emphasize a little bit on the importance of the intake discussion, this is a best practice for your EN to help you put together a robust Individual Work Plan. Let's move to the next slide, please.

So, the intake guidance – the purpose of the intake discussion is to get to know your Ticketholder. Get familiar with their goals and their aspirations, and what they need to be doing, working with you and participating in the program. Determine, first of all, if they are eligible to join the program. Inform them about the purpose of the program. Some of them may have heard about the program, but not about specific details of what it is and what it takes to participate in the program. So that gives you a chance to have that discussion. Discuss the short- and long-term goals and determine whether your services and supports can assist the individual to achieve their goals. This is an important discussion because this is where you and the beneficiary will make sure that you are both a good fit for each other to work together, and jointly decide whether your EN is a good match. The guidance discusses ways to engage with a

Ticketholder during the intake discussion and the information to cover. This worksheet is a resource that supports the EN Ticketholder guidance that we put out a couple of months ago, to complement it. Next slide, please.

The guidance defines how the intake discussion relates to the IWP Discussion Summary requirement. As part of the IWP, you know that the EN must document the one-on-one individualized discussions with the Ticketholders every time it happens. And it's very specific about what needs to be included in those Discussion Summaries. And as you can see from the slide, we have some of those elements, like the date of the discussion, the modality, if it was in person, or a phone call, or a video call. And what was the summary of the discussion with the Ticketholder? Your assessment of the short- and long-term goal, if it was reasonable and attainable, and how the EN services and supports will assist the Ticketholder in achieving those goals. To include the Discussion Summary on the form itself, in the IWP form, the 1370. You can do that, or you can also incorporate that information into your own template or as an attachment to the IWP. So this Discussion Summary doesn't have to be one way. It can be different ways as long as you include it in the IWP that you are currently using for your EN. And I'm going to read the last bullet. If using the form 1370, which is the official form for the IWP, you need to add the discussion date and the modality in Part 2, documentation of the EN Ticketholder's discussion, Section 1, under the Discussion Agreement. If no other terms and conditions are identified, you can add the Discussion Summary under Part 3, number 15 of the same form. If you're using your own EN IWP template, you should update to include the Discussion Summary section. I made sure to read that part because it's very specific − telling you exactly where you can add the Discussion Summary in the form itself. Next slide, please.

So let's talk about this form. It has a new look and feel, but it also has questions and information that hopefully are going to help you to have, like I said, a more robust discussion with the Ticketholders. Get the information that you need in order to move forward with a relationship and working together. It is fillable. You can download the form. You can complete it and print it. It contains sample questions and a space to capture the date, the Ticketholder's contact information, any additional notes that you may need. And it answers specific questions such as employment goals, dreams and earnings potential, readiness to reduce and, if possible, eliminate the dependence on Social Security disability benefits, skills, education and training needs, any work history, strengths and interests, workplaces preferences, barriers and fears to address and overcome, and fit with the Ticketholder’s needs and EN service offerings. We're hoping that this variety of questions will help you have that conversation and get to know the Ticketholder during that initial discussion. We also want to make sure that you know that this form is not mandatory to use. However, it is highly recommended for all the ENs out there that you may have something in place, and maybe a combination of this form with whatever you have works. But some others may need something like this to help them put in place those best practices to work with Ticketholders. Next slide, please.

And I believe Glynis has posted in the chat the exact link where you can find these forms. Please go ahead and check them out and we would love to have feedback. And with that, it is my pleasure to pass the call now to Janeé Olds, the Director of Workforce Special Projects of CareerSource Central Florida. Janeé, over to you.

Janeé Olds: Thank you. Good afternoon, everyone. Wonderful Wednesday. I want to share a little bit about CareerSource Central Florida. Our mission is to connect Central Floridians to careers and develop skilled talent for businesses. We curate local talent for high-demand industries, meeting local business needs, and cultivating growth and prosperity for the Central Florida community. As a workforce EN, we equip Ticket to Work participants with the resources to take charge of their vocation, find a career that meets their individual needs, and contribute their talent to the Central Florida community. Next slide, please.

Let's get into how we get started with a Ticketholder. We have leads come through two different avenues. So individuals inquire using an interest form that we have on our CareerSource Central Florida website landing page. We have a whole page dedicated specifically to Ticket to Work. And if an individual is interested in the program and wants to learn more, they can complete that interest form there. Or we have internal staff who work a variety of programs. They can refer customers once they deem them eligible to the Ticket to Work Program as well, through an email that we have internally. And that starts our initial engagement. Our EN staff will then contact the customer via phone or email. And we verify, hey, are you in fact interested and eligible? And then we invite them to our Ticket to Work orientation. Next slide, please.

Orientation is held every Tuesday at 11:30 a.m., and we invite all our EN staff. That is crucial and it's important because we want to make sure that our potential Ticketholder sees the entire team. We want them to know who everyone is. And then we offer this orientation both in person and virtual across our five-county footprint at all of our locations. The staff are pictured in our orientation, and they introduce themselves to the participants, again, to become familiar. And then if they're virtual, we do recommend and highly encourage that the camera is on so we can have optimal interaction. During the meeting, staff will send an email to all participants with the link to the Ticket to Work interest form. And they verify that the customers have received it. This is something that we implemented a couple of months ago, and we find it very effective. Because if we send it after the fact, we might not get them to fill it out as soon as we need them to. So we want to go ahead and send that interest form while the orientation is going on to get them a little bit quicker. Next slide, please.

Our intake appointment. So, prior to the appointment taking place, we review the Ticket Portal to verify Ticket availability. And then we review the Employ Florida website to see if the customer has registered. Employ Florida is a secure portal and data management system for job seekers and employers. What does that mean? Employ Florida gives our Ticketholders a wealth of information of what is available in our area. What are the jobs that are available? Also in that system, they have a wealth of courses that they can take. It's theirs to use to their leisure. Also, for employers to look at our Ticketholders to see if they would like to interview them and hire them if they so choose. During the intake appointment, we determine if the customer is the right fit, and that is extremely important. We have a conversation with the customer. We want to make sure that we are a good fit for them, and they are a good fit for us. If not, we refer them to another community partner or whoever we feel would best service their needs. This is a mutually agreed upon journey that we want to take together, a career journey. Our orientation is like we're dating or getting to know you. Our intake appointment is, okay, now we're engaged. We're engaged now. So we are agreeing together to move on this journey hand in hand. I got the ring. You have the ring. Next slide, please.

Then we get to the IWP consultation, together with the Ticketholder, and that's extremely important. Remember, we're engaged now, so everything we're doing is hand in hand. So we want to collaborate to create the IWP following the intake appointment. This can occur the same day or at a separate appointment. If we feel like, hey, this is a good fit, we're a good fit together, and we can do this career journey. If you have time, we can do it on the same day. If not, we can do it on a separate day, depending on the customer's needs. We create short-term and long-term goals using the SMART method. Objectives are clearly defined steps to achieve each goal. We want to make sure that for the goals that we are setting, they know exactly which steps they need to take in order to get there. It's easy to read so that everyone can understand what has been agreed upon. We review the Ticket to Work Program expectations to ensure clear understanding. Again, we're engaged, but we haven't – we're not married yet. So we want to make sure that we are still going the same path. We complete and review the IWP agreement or contract together, and then we schedule the IWP signing day appointment. This IWP consultation typically happens virtually, so the IWP signing day appointment would happen in person. Next slide, please.

So IWP signing day is in person. We are getting married! We are getting married. This is a celebration for the customers joining the Ticket to Work Program. We take pictures, of course, with a signed media release form. And we congratulate them and welcome them to the CareerSource family. We make a big deal about this because this is a – something that they're dedicated to and something that we're dedicated to, to make sure that we are together and moving for a career, moving for self-sufficiency. Whatever that looks like for that customer and meeting their needs. So it's an exciting event. Typically, we invite multiple Ticketholders at a time, and we move across our five-county footprint again and meet the customer where they are. So we don't have them come far. We want to make sure that they can come to a reasonable place, and we're very accommodating. We make it a big deal, and that's super important. Next slide, please.

All right. So now I'm going to turn it back over to Derek. Thank you.

Derek Shields: Thank you so much, Janeé, for your presentation and review. Well, first of all, for your energy. I love it. And you're clearly passionate about the work that you do at CareerSource Central Florida. And we now have an opportunity to dig in a little deeper. But to go backwards, we talked about your mission and how you identify leads and then, you know, the orientation process. But when you go from intake to consultation and then signing day, kind of, three phases of this relationship. You started to bring up some unique ways of describing the work. And so let's get Angie to come in now too. And we'll have a small panel and bring Ana in as well. So this is an opportunity to explore this in a little bit more detail, which I appreciate. And we'll turn the slides down so we can focus more on our guests. And then afterwards please have your questions ready or start preparing them and putting them into chat if you'd like, because we'll have plenty of time for a good Q&A too. So let's start out with Angie. Angie, you work with Janeé, but we haven't heard from you yet. So I want to talk about the labeling that I've heard. And in preparing for this, it really took my attention. We heard from Janeé about rings, and commitment, and marriage or this – yeah, of this notion. And labeling these with some milestones and some cool, fun names, especially IWP signing day. This got my attention as a high school athlete that never went very far. I always wanted a college signing day. And you all provide that for Ticketholders with the ceremony. You know, what was it that got you in this direction? And you know, talk us through these parts about how it's become, it seems to me, an essential part of your brand itself.

Angela Smoak Hunter: Well, thank you for that question, Derek. This is Angie, by the way. And I appreciate the opportunity to be able to share not only what we do, but how we do it. Because this whole thing started because we are truly, truly passionate about people, number one. But it started post-pandemic when we received that mandate – And I say mandate because I can. I found out it's allowed. I can say that, for the wet signatures. What we did, we took it and marinated it with a little bit and thought, how can we turn this around to try to make it positive for everybody? So because we all need human interaction, I don't care who you are. And I need human interaction. I'm like a jack in the box. Don't put me in a box. I'll pop out. I promise you something will happen. But through all that, we came up with a wet signature mandate. So what we did was take a tour around our region. One Wednesday for five Wednesdays, we met at our local centers. And we called it the Catalyst Connection, the Ticket to Work Catalyst Connection. And we invited the actual participants that lived close to those different locations to come in, have a reception, just like at a wedding, right? Come in, take pictures if you want to take pictures. And guess what? Sign their wet signatures on their IWPs again. So we renewed that relationship by updating and amending those IWPs while they're there.

How did that turn into this big signing day? Well, because we learned about changing business as usual, what we used to do, making it real. Making it more intentional. Embracing relationships because that's really what this thing has to be, or it will not work. We've already figured that out. Creating some enthusiasm, which is the catalyst part. Throwing that in there. And becoming more friendly and making it a mission to do something, meeting the people where they are. So all this came about, and that was popular. That was pretty good, Catalyst Connection. So we got to thinking about it. I remember when I was a kid and everybody did the Kodak moment. Remember that? Some of you kids don't remember that, but a Kodak moment where you took a picture. If you go back into old box of pictures that your mom has, grandmother, whoever it happens to be, if you look at it, you can actually go back to that place. It can take you back in time. It can take you back to the exact place, what you ate that day, where you went, whatever. That's what we want to do with our participants because truly, we're not only getting married, but we're building a relationship. We want to be – I love slogans because they catch, right? We want to be one through five on your speed dial for every participant in our program. Angie, why? Because when they get a job, I want them to call us. When they get married, I mean really married, I want to know about it. When they graduate, finish their training, I want to know about it. So when they have these like that, they know that we're going to be the cheerleaders in their life that maybe they never had before. So we took that and made that individual signing day as a stem of what we did for our Catalyst Connection and made it something that can happen every single time the person comes and signs, it's not the end of anything. It's the beginning of everything, and now we can look back. That's where it started. Derek. Back to you.

Derek Shields: Angie, thanks a lot for taking us through how you got to where you are with IWP signing day. And the idea of developing a relationship – when we were planning for this, you were saying, you know, I have friends, and if I don't talk to them about once a quarter, well, we don't stay friends. And the same thing happens with these communications. You've built up a milestone model that allows for monthly communications. And then you keep it going so it's not quarterly, but you maintain monthly even during the quarterly phase. That allows for that relationship to occur. Sometimes we frame that as two-way communication, but what you frame it as is a commitment from each side, and let's work together. I also really like this about the IWP signing day. It's a milestone event, and, yes, I know Kodak well. I grew up in Rochester, New York, and a lot of my mentors were Eastman Kodak employees. But the idea –it's two things. One, you made it here, so it's progress. And then, two, it's the start of something completely new as well. So it's a really creative way of doing it, and I appreciate you sharing that. So, let's go over to Janeé now.

As you know, we're focusing on this notion of customizing each relationship to increase the value of everyone's experience, but importantly, the Ticketholder's experience as to why you do what you do. And when it comes to associating with the crafting of those IWP goals – and we really look at these as those long-term goals. You know, the short-term goals seemingly are easier for us all. When I mean us all, Ticketholders, but also most humans in general. Short-term is easier to see rather than long-term around the corner. What recommendations do you have from the body of work that you have at CareerSource Central Florida, but maybe just from your career in general, about how to generate meaningful long-term goals for these Ticketholders that are associated with steps that can achieve the goals? What are your thoughts here?

Janeé Olds: So I just want to go back to the relationship that starts day one. So it starts from the moment that we meet the customer during orientation, and we capitalize on that. We recognize at CareerSource that we are the workforce experts. So we have to have candid conversations with customers before the goals are created. And that really starts with in the intake appointment when we get to know the customer. It's crucial to get to know the customer before you get to IWP. Really understanding what their wants and needs are, and being real with them because you have to establish trust. As everyone on this call knows, sometimes Ticketholders are very leery, and they don't want to be that open with us because they don't know us. A lot of us will be the same way, whether we're a Ticketholder or not. So I think that's very important before you can even create a goal. Whether that's short-term or long-term, is really having an in-depth conversation. As Ana mentioned earlier with the intake tool, yes, it's a guide, but you have to know what you're talking about and really just engage with the person, and it's not a checkbox. So I think, for example, if you have a customer who says, I want to be a truck driver. Okay, but you have a back injury, and you can't sit for long periods of time, are you really going to be a truck driver? Let's look at something else because now I'm setting you up for failure because I want to make sure that you're successful. So really having those in-depth, candid conversations is important and then guiding them to the right employment opportunity. And then once they really understand what's out there and what's doable with whatever their disability is, then we can start talking about long-term goals, and what the steps are to get there. Because I think before you do that, we're putting the cart before the horse. I think that's very crucial.

Derek Shields: I appreciate that. Let me follow up there. So intake and the beginning of IWP consultation are potentially honest feedback and frank discussions. When you turn the corner and you start to say, okay, well, now we have some agreement. Let's replay how Employee Florida as a resource comes in the job market. What is available for an individual, and what those goals are. And then how do you create those actionable steps? You mentioned you leveraged the SMART planning process. But how do we go from, okay, this is where we want to be to that longer-term goal, if it's three to five years out? So any additional thoughts on that, Janeé?

Janeé Olds: Yes. So utilizing Employee Florida. I mean, we definitely have industry conversations to talk about what's actually in the market right now in our local area, and I think it's very good for all agents to know about what's going on in their area. So we have those conversations. Say these are the high-growth industries that are booming right now, and let's talk about how and if that's something that you are even interested in. And then when we identify what goal they want to do, how can we get there? Is there training that's needed? Do we need to go to school for that? What are the steps to get there? Because your long-term goal can be, I want to be – I'm going to use the truck driver. I'm just going to stay there. Let's say the person can be a truck driver. I want to be a truck driver. Well, what are the steps to get there? Well, you have to go to truck driving school. Let's see how long that is. How many weeks is that going to be? Then what's next? We need to look at your resume and update that thing. I mean, so then we talk about that. You can't just set a long-term goal and just leave it there. You have to do realistic steps and check in with the customer. You can't just leave them hanging. The IWP is a rolling document. You have to revisit that bad boy and say, hey, okay, we said you were going to complete school around this time. Let's check in and talk about that. Have you achieved that goal? And that goes, again, back to the relationship building. It's not a quarterly thing. It's a monthly thing. It's a biweekly thing. Let's talk about it. I'm going to be your biggest cheerleader to get you to where you need to be. And I think each of our Ticketholders need an accountability partner, and that's what we are to them.

Derek Shields: Thanks, Janeé. This is Derek. I appreciate you bringing that up as accountability partners because that's what the relationship is for allowing their progress. And that's moving towards a return to work, you know, on their journey to financial independence. But to have you with them as part of that employment team. You've done some innovative things. We had some fun with the IWP signing day. And I think it's cute but it's also – it's leveraging a moment to begin something else. And I know you have some other innovative strategies that are out there. Janeé, you want to share with us a couple more of these strategies?

Janeé Olds: Yes.

Derek Shields: And resources put in place?

Janeé Olds: I do. I get gooseys thinking about this. This is where I get goose bumps. So, you know, I'm very proud of our team for thinking outside of the box and coming up with different ways to engage our customers. And one of the ways that we have done that is create an Access to Careers Pathways Program. It is a three-week exploration academy, career exploration academy, if you will, that really introduces our participants to various industries and employment opportunities that are out there. So we bring in employers. We bring in training providers. We bring in community partners. And our most recent one was Encore and individuals with disabilities. Encore workers are those who are 50 and up and are Ticketholders as well. And we cover a variety of things. We cover financial literacy and soft skills. Soft skills are really what employers are looking for on top of just your specific skills that you need for your job. But soft skills are what's lacking. And if you've been out of work for a long time, you might need a refresh on those things. So we talk about that. We look at resumes. If you applied through the newspaper the last time you went to work, we might want to look at how do you apply online? How do you do a virtual interview? There's a lot of individuals who have not had a virtual interview. Let's go a little bit deeper. How comfortable are you going into a panel interview because that's more common than not nowadays. So we cover a gamut of those things through our three-week academy. And at the conclusion of it, we have a hiring event. So we do a job fair specific to – we've, again, built that relationship. We know what they're looking for, and we bring employers in that we know are employers that are looking – or offer jobs that they're looking for, and we do a hiring event. Some individuals walk away with permanent employment, while others, we give them an internship. If you've been out of work for a little while, you need to have something recent on your resume. So we can offer up to a 12-week internship for our participants so they can get their feet wet again and try things out. And then we have a huge celebration at the end, and we have a graduation, and we celebrate them yet again. We don't stop celebrating our participants. We continuously celebrate them. So it's an innovative way for us to engage the customer in a cohort style where they are now collaborating not with just us, but their peers, which is great, which is absolutely wonderful. And it has been proven effective time and time again. In our last cohort, we had five individuals who walked away with an internship. One has not worked in 20 years, and she is as happy as can be. And that's the impact that we want to make in the lives of our Ticketholders. Sorry, I get excited about that.

Derek Shields: We love it. We love it. Thank you, Janeé. I want to actually come over to Angie, about something that Janeé was talking about. It dawned on me. When we were – we first met, Angie mentioned that you used the previous intake form or tool, and, you know, you're excited to look at this new one that's come out. It was shared in the GovDelivery right before the beginning of this event. The academy piece and all the content that's in it, how do you look back at the intake discussion and use the form to connect the dots between? I just had a conversation with somebody, and I know that our academy content is going to be a good match. Like, is there a way to correlate between the form and the intake discussion in that academy?

Angela Smoak Hunter: Well, I think the best part, Derek, is, like Janeé said, knowing where the beginning and knowing where our goal is. Every person is different. We all know that. In this Encore/disability academy, most of the people look like me. Being middle-aged or, you know, thereabouts, whatever. And it was really cool to see all the different pieces. I think Ticket to Work we had four. I think we had four in that academy. And all four of them graduated, and I believe all four of them came out with an internship. So I'm excited about that. One of them was 20 years out of work. But to have all those pieces – they come in individually, but they walk out a graduating class. So it's almost like they've renewed their high school graduation again. I mean, heck, they may even want to have – I've invited them to have a once-a-month Teams meeting so they can come together, share where they've been. Share what's going on. Start this way, because this has been a baby we've been working on for over a year. And when it came to play, I just couldn't wait to be there. I drove 50-some miles every single day just to go because I want to see how this is going to work. I want to see what we can do better, what's working now, and how we can enhance it. They brought a bank in to help people with their financial wellness, Derek. And offered them cash, not on the money, but you know, to actually open a savings and a checking account. Some of these people didn't even have that. To think about that in 2024, people don't have a checking or a savings account, and now they're walking away with that. Learning some financial wellness. And as you see, you think, Janeé – we're crazy. We are crazy, but we're crazy about our people. Passion is just – it keeps me coming to work every single day, even on my walker. I love it. These people are just amazing, and we bring out of them things they didn't even know they had. That's the coolest part of all because relationships always make something happen.

Derek Shields: Excellent. This is Derek. Thank you so much, Angie. I appreciate that. And now, your commitment is clear, but you're reaching people, and you're using creative, innovative solutions in doing that. But you're using consistent solutions. And twice now we've heard the power of peer connection, and I think that's something else that we haven't heard much about – about how can we build Ticketholder peer communities where they're supporting, and influencing, and encouraging one another? So thanks for that. I want to bring Ana in.

Thanks for your patience, Ana, here as we – you've been listening to what CareerSource Central Florida is doing, and Janeé, and Angie's model. When you think of all the content that the EN Development and Training team goes through, you know, on a weekly basis and a monthly basis. We hear trends and we see things between the training and the needs of service. Any themes or something you wanted to call out that would add to the discussion?

Ana Morales: Sure. First of all, I want to say that I did enjoy listening to Janeé and Angie talking about everything that they do. It definitely shows their passion and their love for what they're doing. So I think that's a very important part of all this, right? So congratulations. It's really, really rewarding to hear that. From the training perspective, we're very pleased to hear that some ENs are doing the things that you are doing and happier to have you here for others to hear because that's our goal, right? The best practice that we can share with others, and take advantage of the tools that we have put in place. I know that the Ticketholder guide was put out recently. Now we have this intake tool to support it as a resource. And soon we're going to have new and improved training modules that hopefully are going to complement all the pieces of the pie. And we're going to – it's going to help the ENs to have the information readily available and to just get better; get better with their IWP submissions, with their services and supports. And more important, with the services that they are providing to Ticketholders.

Derek Shields: Yeah, thanks, Ana. It's reinforcing, there's also something about, you know, from intake to IWP and the idea of building a relationship one individual at a time. And I know that's a bit of an anthem or a tagline for CareerSource and for Angie as an individual, too. The customization of services. And I think this is where sometimes we hear frustration, or we get off the tracks in designing an IWP. But it does need to be unique and customized. And this model, although it might be a higher touch than some other ENs are doing, it allows for that customization, which should have higher returns for those individuals for employment-related outcomes, but in other important areas as well, like financial literacy and wellness, as an example we heard.

All right, so, we're doing okay on time. I do want to turn back to Angie and Janeé for a final question, and then we're going to open it up to the audience questions too. So let's go with Angie first. And we have time for a final question. What's your key takeaway? We've been all over the place with different ideas, a lot of passion, too. But to adopt this mindset or tactics, what would be something that you would share? Or maybe it's just completely new that we haven't covered that you would really like the audience to take away to them.

Angela Smoak Hunter: Well, thank you, Derek. First of all, thank you, folks, for having us. This has evolved, and if you only knew the story, folks out there, it's amazing. I mean, it's amazing to be at this point, and being able to be on the same page with Social Security and Ticket to Work. It just blows my mind out of the water. It's very fulfilling for me. I'm not a person with a lot of paper. It means I don't have a lot of things hanging on the wall, accolades saying, oh, I graduated from this or I did that. But I will tell you what, the paper may get you in the door, but the passion that you have every day that you get up and come to work will keep you in that door. So with that being said, there's something new on the horizon. I'm not going to give it away, but it does have to do with something like this, and you see it. Okay?

Derek Shields: Just describe that for everybody.

Angela Smoak Hunter: I apologize, Derek. I forget everybody is not like me. This is a small, rubber duck. You may see them in the dashboards of Jeeps all over the place. If you don't know what it means, look it up. It's a very wonderful thing. But we are actually turning that into a Ticket to Work DUCK. It's going to be DUCKs. So DUCKs out of water, disability people out of the zones. Get ready because that's the next thing coming. And I will say this, what it means is Display Uncommon Courage and Know Yourself. Back to you, Derek.

Derek Shields: Hey, Angie. That's great. Thanks for sharing a little bit about your personal pathway to success. But also always looking at new ideas and bringing in new approaches. And the duck, you know, as a previous Jeep owner before ducks were around, I pay attention to these ducks on dashboards. And you're leveraging this trend for something else, which is really cool. Say it one more time. What does ducks stand for?

Angela Smoak Hunter: Display Uncommon Courage and Know Yourself.

Derek Shields: Excellent. Display uncommon courage and know yourself. Good tips to get going on your journey, and being true to yourself and making those accomplishments. Let's turn over to Janeé. Same question that I asked Angie. You know, we've been all over the place. Is there something that's a key takeaway that you would like to offer before we open it up to the general Q&A? Janeé?

Janeé Olds: Yes, I have something for everyone. Meet with your teams regularly. And I'm talking about your EN teams. See what's going well. See what's not going well. You have to evaluate constantly. We were talking about innovation. You can't be innovative if you're not looking at where you are, where you're going, and what's working and what's not. We send birthday cards. We send holiday cards. I mean, we're always thinking about innovation, how we can keep that engagement going. But you have to have discussions with your teams because they may have ideas and you're not tapping into those things. Again, looking at the data, how long does it take for a customer to go from orientation to IWP? Where's the gaps in between that? What changes can we make and alter to make our own processes better? We look at that quarterly to see what's working. Did it work? Did we try something new? If we tried it, should we change it? Trying and trying again. And I think that's key.

The last thing is quality, not quantity. You're going to get the money if you invest in your people. It's not about how many people you have. Because if you have 300 people and you only have three staff, it doesn't make sense. Do you really have relationships with those individuals? The money will come. It's quality. Build those relationships. Build trust. And you'll get the results that you need.

Derek Shields: Thanks, Janeé. I love both of these. You know, I did a quality management meeting this morning, so it's interesting to hear this. But let's go back to the previous part, continuous evaluation. Like, you know, how do you come up with metrics that matter? And then how do you talk to your team about those metrics, to have a conversation so you can go around quantity, quality, risk, you know, positive and negative? How do you come up with the metrics for that conversation?

Janeé Olds: Well, we set a goal for ourselves each year of what we want to set our sights on. Just like we do with our customers. We have to have our own long-term goals, so we have an annual goal for ourselves. And then we come up with a strategy around that. But I think the first thing is you really have to come up with a system of how you're going to track it. We track every bit of our own process. The other thing is you have to have a process. Social Security has set the standard of what documents we have to use, but if you don't have a process of how you're going to move someone through their career journey, then that's where you have to start. And then how do you track that? How do you track how many people went to orientation? And how many people went from orientation to interest form, etc., etc., etc.? How many people fell off after they received a job? Because after they received a job, yes, we're required to do quarterly. But maybe that's why they're dropping off and you don't have a relationship because you should be calling them monthly. I mean, we look at all of that. So one is having a process in place and having that discussion with your team too, so that they understand the process. So everyone is moving and shaking the same exact way. And then after you get your process, how are you tracking the movement of your customers? So that way you can pivot as needed. You can't pivot if you don't know the data. So it's extremely important.

Derek Shields: Fantastic. Thanks for that extra detail there. Document your process, and then let's figure out the gates between, and we can start measuring and have that conversation. So let's now, if we could, Alicia, bring back the slide deck.

And we're going to pivot over from this panel discussion, as we framed it into a broader Q&A. And we do have some comments and a question that's been placed, so we'll turn to that. Prior to doing so, I just want to remind folks about how to participate, in case you haven't joined us before. So we do encourage you to ask questions and use the MS Teams chat. That's the easiest way to participate for many folks. However, if you are joining via telephone and wish to ask a question, it's a two-step process. First, press star five to raise your hand. Then we'll call on you, and then you can unmute by pressing star six. Star five, and then we'll call on you for star six to speak. If you're joining via Teams and wish to ask a question, use the raise your hand feature. We'll call on you and unmute your mic. We do ask you to limit your questions to one per person. And if you have additional questions, you could submit them to us at our email, ENOperations@yourtickettowork.ssa.gov. So we'll leave those up as a reminder and turn to the comments and questions we've had so far.

First off, I just want to go back, a little while back when Angie mentioned getting a wet signature. We had a comment that said – or a question that was submitted, whether IWPs must have wet signatures. And Tiffany on our team responded, electronic signatures are acceptable if they have the time, date, and stamp. So I just wanted to make mention of that. It doesn't take away from the point of the wet signature signing day allows for a special Kodak moment that allows for the relationship to have the different milestone. But there is a way to do that from afar. So I just wanted to make sure we mentioned that.

And then let's go to the first question that we have. It was submitted, Kim mentions, what has been your main referral source? And we talked about leads a little bit in the presentation that Janeé provided. Either of you care to comment, or both of you, about your lead referral source?

Angela Smoak Hunter: I'll take that one, Janeé, if you'd like.

Janeé Olds: Okay.

Angela Smoak Hunter: Our referral source is – our website has a Ticket to Work landing page. So the interested individuals can go on there, and they can actually fill out that landing page form. And that comes directly to the Ticket to Work team, myself. And then I hand those out to the staff so we can contact those and make sure that they're really looking for Ticket to Work. It also helps us with other programs because sometimes people just fill in something, and then we can always lead them to another part of CareerSource that may be more beneficial, because they are actually Ticket to Work eligible. So it's kind of a double-edged sword there. But we're able to still touch the person to start that relationship instead of just sending them off somewhere else, or no, you don't apply or whatever. And we also have the academy. We actually gained a customer through the academy, which we did not know that this person was eligible, and the person did not really know about Ticket to Work. But they learned it through attending the academy, and that's kind of how that works. So that's a one-on-one kind of thing. Of course, in the community, we always are out doing things in the community. Helping other ENs in the area that would like to share what we do, or how we do things. Or maybe glean off of some of our crazy, antic ideas that actually work. We're always willing to do that. So it's for a multitude of different ways we get those, Derek. It's just not one way or another. But we are actually looking into the marketing idea as well, so we're on the cusp of that. Once we get things settled for what we want, the marketing tool for the Ticket to Work Program, we are definitely looking into that. Ms. Rose, don't give up on us yet. We're coming back. But that's another way. We're really excited about that. We just want to make sure we have everything in gear so we can really not change our relationship model because we may get a large number. We never want to do that.

Derek Shields: Thanks, Angie. Appreciate that. This is Derek. I think the marketing business program does help an EN scale with more referrals. But your blended referral model also comes because of the nature of an organization that you are. You do Ticket to Work, but you also have other service areas, so you can see a customer go between one or another area. And if you aren't an EN that's like that, you could create a partnership or a collaboration with other service providers that would provide the same type of sharing of a referral.

Kim asks this question next. How many people are on your team, and do you each have – I'm sorry, and do you have each one do specific things? I think the idea here – as you mentioned, you have a documented process, but how is it staffed? Is there an intake specialist, an IWP consultant? And then I want the one with the signing day to be the business owner, you know, signing on the new star. Is it siloed like that? Or do you have more of a blended case manager that goes through the experience? Janeé, do you want to take that one?

Janeé Olds: Yeah, it is siloed. We do have someone that is our orientation person, and she also does the intake appointment. And then we have another staff member who takes on the IWP, and she carries out the remainder of the relationship. So again, they meet all of the staff from the very beginning on orientation day. But we do have them do specific things so we can move them, again, through our journey. And it goes back to what you're saying, Derek. When you have that process, everyone knows what their role is, so that we can move swiftly through that. To answer the question, how many do we have on our team? Currently we have three. We are going to increase it to five. So yeah, we're going to add two more people because we do see a need there. So we will be having a team of five.

Derek Shields: Thank you for that answer. This is Derek again, and I don't recall if you mentioned it earlier, so I'm going to ask, see if you're comfortable in saying. Like, how many Ticketholders are you currently serving?

Janeé Olds: 85, right, Angie? The last time I talked, or is it more than that?

Angela Smoak Hunter: I'm glad to report we have 94 now, Janeé.

Janeé Olds: Oh, 94!

Angela Smoak Hunter: Yes.

Janeé Olds: Okay, correct me. I love that. But can I mention, Derek, with the 94, we used to have hundreds of Ticketholders. And we really had to assess – at one point we had over 200. And we had to say, okay, but what does the relationship look like? So we did multiple attempts to try to contact the customer, and we had to be okay with letting them go. Because again, I mean, it's about quality, not quantity. So we got down to a lower number than 94, but we're building it back up. So I'm proud of our team for what they're doing.

Derek Shields: This is Derek. Thanks for that context. Well, you used to have more Tickets assigned. Now you have what you're referring to as better relationships assigned. And they're more likely to lead to program impact for the Ticketholders, which is beneficial to the EN. And you're better positioned to scale, which you're about to do. So congratulations on that. I'm sure the three employees supporting the 94 will be happy to have two more colleagues join in to help with the work itself.

So we are winding up on our time for our hour together for this EN Essentials. I'll just make one last call for any other questions that anyone attending today will have for Angie, Janeé, or Ana. We do have two comments – well, here's a question, and then I'll read the comments before we close. Amanda submits, "In your opinion, what is a good caseload size for one staff person? Does it make a difference if the caseload consists of working and non-working Ticketholders?" Any thoughts there?

Angela Smoak Hunter: Oh, I've got thoughts on that one, absolutely. If they're working, of course, they're less stress to you, less stress to the case. It is not so intensive, even though we do still contact them once a month. But if you're looking for work and those type of things, that needs to be a whole lot different – like a number. If I was in a public school system, I would say, you know, 25 to 30 per classroom. Not optimal. I think they want 22, something like that. But realistically, about 40 to 50 on a regular case. If you're really working them, that's like one, maybe one and a piece a day. Work days are only 25, 24 work days a month. So honestly, if you're really taking time with those people, that would probably look like something a little bit more realistic. Of course, you have to do it by scale, what kind of customer service you're willing to give but field of dreams. If you build it, they will come. Back to you.

Derek Shields: Thanks, Angie. I think that's some helpful context for your model. It is higher touch, so there's going to be fewer of those in a day. But over the course of the month, for that monthly engagement and contact, that allows you to get, oh, we'll say, you know, one to somewhere – I heard you say the number 40 for a ratio or something like that. But it might be a little bit less, a little bit higher. All right.

And one final question. Do you have a benefits counselor on staff to explain the work incentives and the timeline as they move through work incentives? Do you have an embedded benefits counselor, or do you source that out?

Angela Smoak Hunter: That's all Janeé right there.

Janeé Olds: So, I have become certified. But we, because of my role, we source that out. We have to, because we're such a small team and just the number of people that come in contact with us, we have to. Again, because even though we have 94 who are assigned, that doesn't represent how many we actually have coming through our orientations. So realistically, to give them the counseling that they need, we source that out, because I'm only one person and I'm not able to do that. So yeah, right now we're sourcing it out.

Derek Shields: Thank you, Janeé. And perhaps as you scale, another benefits counselor could be embedded, that isn't you, that has that.

So just a few comments from folks in chat. Sally said, "This was great. Love your passion, insights, and enthusiasm." She's asking if there could be an EN Essentials similar to this one on retention and career advancement. And then we had Brandy say, "This was wonderful. Thank you so much." Also, “Thank you, everyone. Thoroughly informative and well done.”

We appreciate the feedback, but most importantly, we appreciate Angie and Janeé taking the time out of their busy schedules to be with us, and to share their business process and some recommendations about how to have fun and help people on their journey to financial independence. So thank you so much, Angie and Janeé, and CareerSource Central Florida. We appreciate you.

Janeé Olds: Thank you.

Angela Smoak Hunter: Our pleasure. Thank you, Derek.

Derek Shields: Thank you. And now if we can go – I believe Glynis is going to post Angie and Janeé's email addresses in chat. They welcome any direct contacts. If you have questions or want to collaborate with them on some of the ways they have approached the work, I'm sure you'll find that informative. And now if we can go to the next slide.

We'd just like to wrap up with a few reminders about what's around the corner. Ana and I certainly appreciate all that you're doing and being with us today. Next week we do have an all-EN Call on November 19. We encourage you to participate in that. That agenda will be coming out on Monday. Again, that's on Tuesday, November 19. We look forward to everyone joining us for that. And before we wrap up the year, we have two more WISE webinars. On November 20, just next week we will have a WISE webinar entitled Ticket to Work for America's Veterans. We have a guest presenter coming in. She's fantastic, and I encourage you to get this message out to everyone to reach veterans that could be a dual-eligible Ticketholder. So November 20. And then on December 18, we'll wrap up the year with one of our more popular WISE webinars, *Debunking the Biggest Myths About Ticket to Work*. This will be the same content with a little refresh to it, but we encourage you to share that. It always helps individuals in addressing some of those biggest myths. And with that, I also encourage you to access our archives. You can look inside of the 2024 calendar of events to access past EN Essentials, and find our calendar for these events. And soon we'll post the calendar for 2025, for the All Calls, along with upcoming EN Essentials and other events to get those on your schedules. We do encourage your feedback. Please reach out to us with your feedback and recommendations for future EN

Essentials at our email box, ENOperations@yourtickettowork.ssa.gov . On behalf of the Ticket Program Manager and Social Security, thanks for joining us. This ends today's EN Essentials.