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# Oregon's Work Incentives Network

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## **Project Review**

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January 31, 2011

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# **Oregon's Work Incentives Network: Research Results**

## **Abstract**

Oregon's Work Incentives Network (WIN) is a benefits counseling program housed in the Centers for Independent Living (CILs), and sponsored by the Oregon Medicaid Infrastructure Grant (MIG) and Oregon Vocational Rehabilitation Services (OVRs), Department of Human Services. Benefits counseling provides targeted assistance on public benefit issues for people with disabilities who want to work toward self-sufficiency and competitive employment. Partnership with OVRs enables counselors in that system to refer clients to WIN. The MIG funding has allowed WIN to take all other referrals from the community, making it different than other projects assessed by research studies. Due in part to the Order of Selection that was in effect during the enrollment period of this evaluation, only 18% of cohort received services from Oregon Vocational Rehabilitation. WIN staff performed a consumer satisfaction survey in Spring of 2009 that is mentioned later in this document.

The Work Incentive Network is made up of benefits counselors, staff training and technical assistance specialists, public and private referral sources, and the individual with a disability who seeks assistance from the network. WIN collaborates with Disability Rights Oregon's (DRO) Work Incentives Planning and Assistance (WIPA) Project which is funded by the Social Security Administration. Housed in Portland, Oregon, DRO's benefits counselors provide the same continuum of services as WIN's counselors and can serve anyone age 14 to full retirement age who receives a Social Security administered disability benefit. DRO and WIN collaborate on training activities, outreach events, and service delivery, together making a comprehensive statewide network of work incentive planning services. The WIN project benefited from DRO's assistance and advice and continues to work closely with the WIPA project staff.

WIN has developed a quality improvement plan and as part of that plan, is using research to test the validity of current practices and help guide future programmatic development. Two formal evaluations have been completed to date and they are outlined in this document.

1. Evaluation of Oregon's Work Incentives Network authored by Jo-Ann Sowers, Research Professor, Regional Research Institute on Human Services, Portland State University. January, 2011.
2. Work Incentives Network Administrative Data Report authored by Department of Human Services, Division of Medical Assistance Programs, Research and Analysis Unit. Salem, Oregon. December, 2009.

**RESULTS:** A survey and data analysis of WIN participants was completed by Portland State University in January, 2011, found that after receiving WIN services, 30.6% started employment, 34% had been working and earned more money.

The data report for 10/1/2007-12/31/2008 showed that receipt of WIN services led to a 4% gain in employment and those already working increased their wages by 22%. On a satisfaction survey completed in June, 2009, WIN participants self-reported that after receiving WIN services 20% started work, 21% earned more, and 38% now want to work.

# Oregon’s Work Incentives Network: Research Results

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#### For questions or comments about the contents of this Research Report, contact:

Travis Wall, Policy and Program Manager  
Oregon Vocational Rehabilitation Services  
500 Summer Street NE, E-87  
Salem, OR 97301  
[Travis.wall@state.or.us](mailto:Travis.wall@state.or.us)  
503-945-6262

# Evaluation of Oregon's Work Incentives Network

## Summary

The public benefits which individuals with disabilities may receive or be eligible to receive are regulated by a complex set of rules. It is widely recognized that this complexity and the inherent misunderstandings that may result serve as barriers to work for individuals with disabilities (Tremblay, Smith, Xie and Drake, 2004 & 2006). The goal of the Oregon Work Incentive Network (WIN) is to provide information and guidance that enables individuals with disabilities who receive a public benefit to make an informed decision about seeking work and how much they will earn. The assumption on which WIN is based and was developed is that when provided with accurate information, more Oregonians with disabilities who receive public benefits will choose to work and increase their earnings. The purpose of this report is to summarize the results of an evaluation of the extent to which WIN is achieving this goal. The feedback of WIN recipients regarding the extent to which WIN contributed to their job and income status, and the quality of WIN services is also reported.

Data obtained through a telephone survey of a sample of WIN service recipients suggests that even during a period when Oregon was in a serious economic recession, the information and assistance provided by WIN enabled individuals to decide to go to work, maintain their jobs, and increase their earnings. The survey participants perceived the services that they received from WIN to be of high utility and quality. Data obtained from the State of Oregon Unemployment Insurance records of the full sample of WIN participants served during the timeframe targeted by the evaluation, suggests that the data related to employment and earnings reported by survey participants was accurate, and that the survey sample was fairly representative of the larger group with regards to these variables.

This study examines one factor that may prevent a person with a disability from seeking work but there are many additional factors that contribute to whether or not someone goes to work. These include the availability of work in his or her community, the willingness of businesses to provide job seekers with a disability the opportunity to work and the accommodations that she or he might need, the availability of employment assistance programs for individuals with disabilities who may need additional help to find and learn a job, and the availability of accessible transportation (McCormick, Julnes, and Liese, 2005). Another factor that affects employment options is the economy, including unemployment rates and Oregon has had one of the highest unemployment rates for the past 3 years. During 2009 and into early 2010 the unemployment rate in Oregon exceeded 11%.

IN SUMMARY, it can be stated that WIN is achieving its goal of providing Oregonians with disabilities who receive public benefits the information that they need to make the decision to go to work and to increase their earnings, and has resulted in increased numbers who are actually working and earning more. The role of WIN is focused on helping individuals to reduce the fear of the impact of work on their benefits. There are many challenges and barriers which individuals with disabilities face in attempting to enter or reenter the workforce. WIN is targeting one issue that has been shown to be

necessary to address, but not always sufficient for individuals with disabilities who received public benefits to go to work.

## Methods

Two sources of data were used for this evaluation. The first data source was the results of a phone survey conducted with WIN service recipients who were enrolled in WIN between July 1, 2009 and October 31, 2009.

Survey Participants. An attempt was made over a two week period to contact via phone all 425 individuals who received WIN assistance between July 1, 2009 and October 31, 2010. The phone surveys were administered by the 11 WIN Coordinators. The WIN Coordinators were assigned to conduct surveys with individuals who received services from an office other than the one in which they worked. This assignment approach was used because it was felt that participants would feel more comfortable giving honest feedback to someone from whom they had not received services. In addition, the anonymity of their responses was assured. Individuals were offered a \$10.00 gift card for participating in the survey.

Of the 425 WIN service recipients, 85 (34%) were reached and agreed to respond to the phone survey. At least two calls were made to individuals whose phone was not answered. Many phone numbers were disconnected and no forwarding number made available. Thirty-six individuals were reached but were not surveyed because they either did not recall receiving WIN services, and 21 did not wish to participate in the survey.

Survey. A 52-item survey was constructed with the input of the WIN staff and the WIN Coordinators. The survey questions sought three major types of information: 1) Participants reported changes in their employment and wage earnings prior to and post WIN service; 2) Participants perceptions that changes that occurred were a result of the WIN services they had received; and 3) Participants perceptions regarding the value of WIN as a service program. In addition, the Concerns About Benefits Scale as adapted and used. This instrument provided a measure of the extent to which participants had concerns about their Social Security benefits that caused them to fear going to work and earning additional income prior to and after receiving WIN services.

The second data source is from State of Oregon Unemployment Insurance records for 310 of 425 individuals who were first enrolled in WIN services between July 1, 2009 and October 31, 2009 (Quarter 3 and one month of Quarter 4, 2009). Social Security numbers were not available for the remaining 115 individuals, and thus, their records could not be searched via the Unemployment Insurance data base. Ten of these 115 individuals were in the survey group. The time frame for the search was chosen to match the enrollment dates used for the individuals who were surveyed. Wage earnings and hours worked was obtained for the three quarters prior to July 1, 2009, the three quarters post the enrollment periods, including all of Quarter 4, 2009, and the two enrollment quarters.

## Results

### Demographics

Key demographics are reported in this section for both the 425 full sample who were enrolled in WIN service between July 1, 2009 and October 31, 2009, and for those 85 individuals who participated in the survey. Not all service recipients or survey respondents supplied information regarding each of the demographic variables. The percentages were computed based on the total number of individuals for whom data was available for that demographic variable. Data is reported for both samples in order to illustrate the extent to which the surveyed respondents are representative of the full sample. In fact, the two groups appear to be quite similar, and, thus, the results of the survey may be viewed as a reasonable reflection of the full sample.

Gender. Of the individuals who responded to the survey and identified their gender, 46% identified as female and 54% as male. The exact same percentages of female and males were represented in the full WIN service group.

Age. The average age of the WIN service recipients was 45 years for both those who responded to the survey and provided their age, and for the full sample. The age range for the survey respondents was 18 to 63 years, while it was 18 to 75 for the full sample.

Ethnicity. The survey respondents and full WIN service group were also very similar with regards to ethnicity. The percent of those who reported their ethnicity as Caucasian in the surveyed group and full sample was 85% and 87%, respectively. A similar percent of Africans-Americans responded to the survey (5%) and were in the full WIN sample (3%). The following ethnic groups were served by WIN in percentages ranging from 2 to less than 1: Asian, Bi-Racial, Hawaii or Pacific Islander, Hispanic, Multi-Racial, and Native American. This was also true for those surveyed, except that no individuals who identified as Hawaii or Pacific Island or Native American responded to the survey.

Disability. Table 1 show the percent of the survey participants and of the full group who reported that their primary disability was one of eight types. Again the groups are quite similar with regard to disabilities experienced.

Table 1. Disabilities reported by participants.

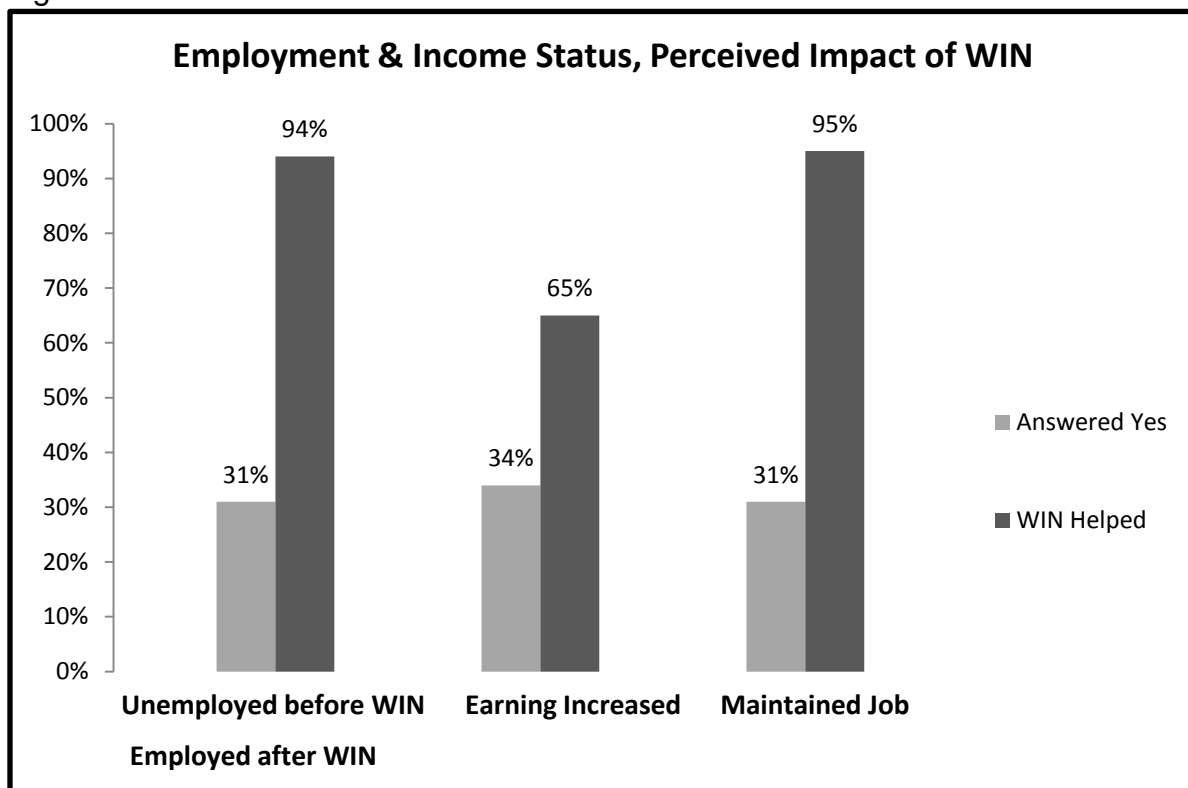
Disability	% of Surveyed	% of Full Sample
Blind	2	0
Cognitive	18	15
Hearing, Speech, Other Sensory Impairment	5	4
Mental and/or Emotional	42	33
Nonspinal Orthopedic Disability/Amputation	11	12
Spinal Cord Injury	1	1
Systems Disease	16	26
Traumatic Brain Injury	6	8

Number of Counties in Which Service Recipients Resided. Individuals who lived in 31 different counties received WIN services during the period being evaluated. Fewer counties (21) were represented by individuals participating in the survey.

### **Employment and Income Status, and Perceived Impact of WIN Reported by Survey Respondents**

Figure 1 shows the percent of the survey respondents who indicated the status of their employment and earnings prior to and following WIN services, and their perceptions regarding the impact of WIN services on their employment and income. The percent who responded “Yes” to the question, “Were you unemployed prior to WIN services, and employed after receiving these services?” was 30.6%. Of those who responded “Yes” to this question, 94% Strongly Agreed or Agreed that WIN services helped them to decide to go to work. The percent of individuals who responded “Yes” to the question, “Did the amount of money that you earned increase since meeting with a WIN staff person?” was 34%, and 65% Strongly Agreed or Agreed that WIN services helped them to increase their earnings. The percent who responded “Yes” to the questions, “You were working prior to receiving WIN services, and you maintained your job after meeting with a WIN staff person?” was 31%, and 95% Strongly Agreed or Agreed that WIN helped them to decide to keep their job and not reduce their earnings. These results suggest that even during the recession, at least a third of the individuals reported that they obtained a new job, maintained a job, and/or increased their earnings. Most impressive is the high percentage of individuals who attributed these outcomes to the assistance that they received from WIN staff.

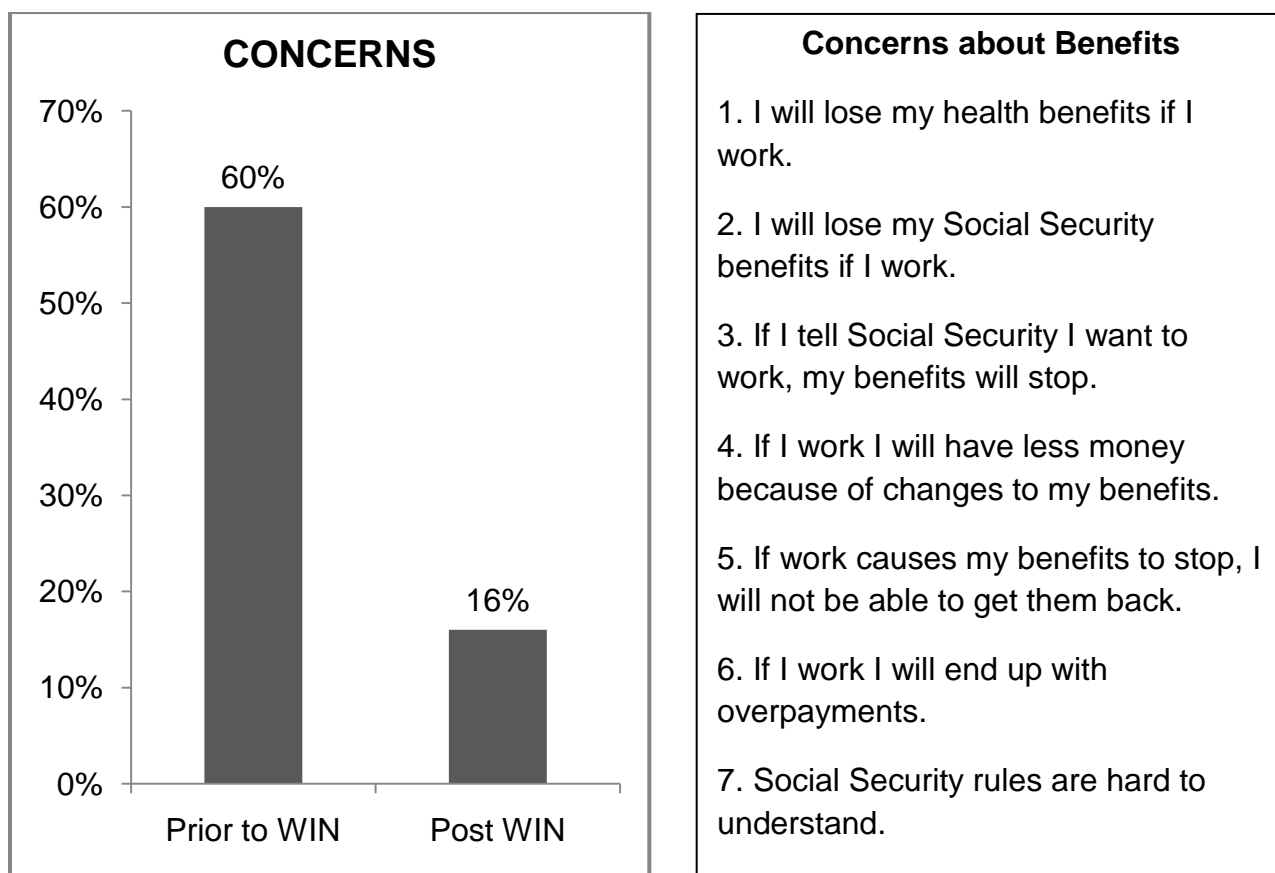
Figure 1:



## Impact of WIN on Concerns which Serve as Disincentives to Working

Figure 2 shows the average percent of respondents who indicated that they were concerned about one or more of the seven Concerns About Benefits issues before and after they received WIN services. These are concerns that derive from misunderstanding of and long-held beliefs regarding the impact of work on public benefits

Figure 2:



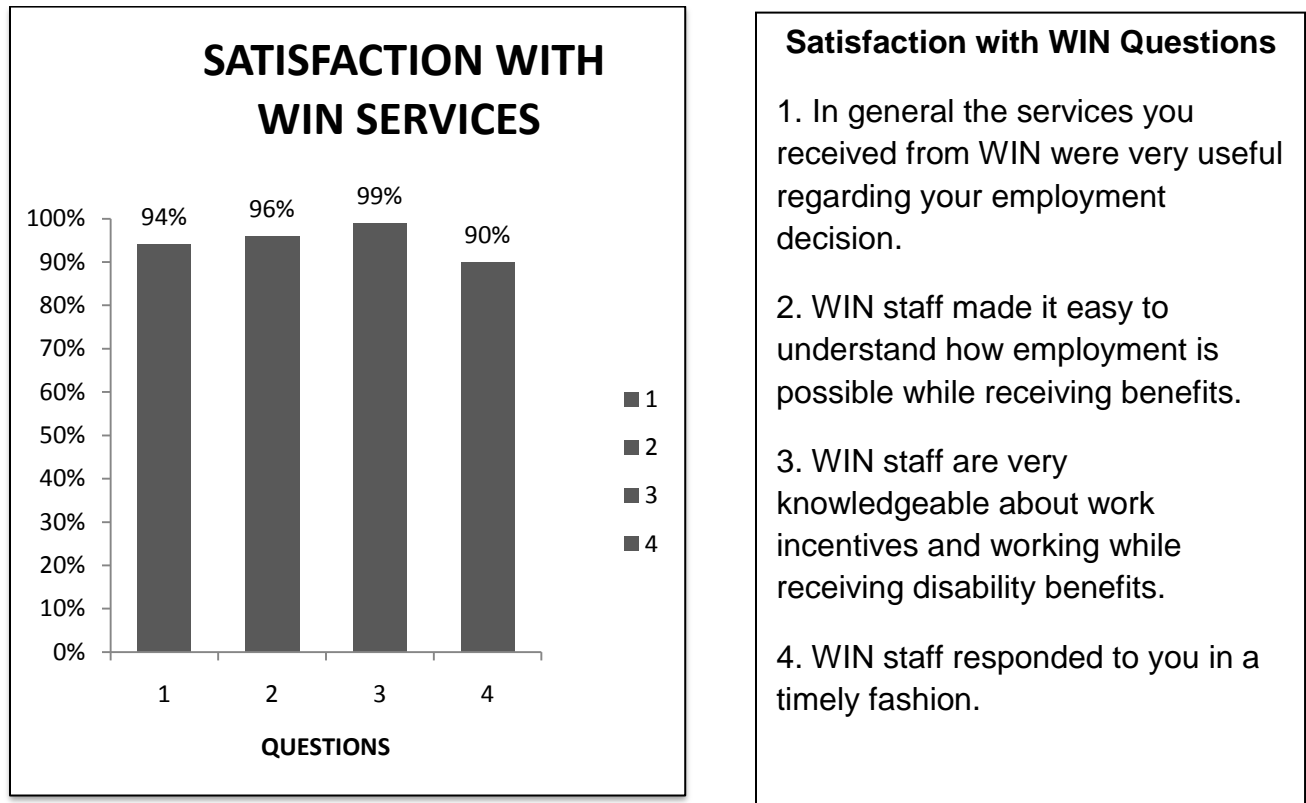
It is a key goal of the WIN staff to dispel these misunderstandings and myths. There was a decrease of 44% of the survey respondents who indicated that they were concerned about at least one of the seven issues that frequently serve as disincentives to working and earning for Social Security. The respondents were also asked how knowledgeable they were about work incentives that they could use to enable them to go to work and earn additional money, while protecting their benefits until they are able to be self-supporting. Only 22% indicated they were knowledgeable prior to WIN services, while 78% agreed that they were knowledgeable after receiving WIN services.

## General Satisfaction with and Perceptions of the Utility of WIN Services

Figure 3 shows the percent of respondents who either strongly agreed or agreed with four statements about the utility and quality of WIN services. The vast majority of the

survey respondents clearly felt that their experiences in dealing with WIN were very positive and that the assistance they received was very useful.

Figure 3:



### Wage and Hour Data from the State of Oregon Unemployment Insurance Records

Figure 4 shows the average earnings of all WIN service recipients enrolled in Quarters 3 and 4 of 2009, and for those who participated in the survey for the three quarters prior to enrollment and the three quarters post enrollment for both the full and surveyed participant groups. The data includes both working and non-working (\$0 earners) participants. The pre-enrollment data coincided with the beginning of the recession, and, thus, the decline in earnings is not surprising. Earnings increased when participants began receiving WIN services and remained at above pre-service levels during the post-service period for both groups.

Compared to the full service group, the individuals who participated in the survey had lower earnings, which fell more sharply during the pre-service period. In addition, the survey participants' earnings increased slightly more compared to the full group. This may help to explain why these individuals were more willing to participate in the survey, and may indicate they are more likely to have a favorable impression of the services they had received than the full group if they had participated in the survey.

Figure 4:

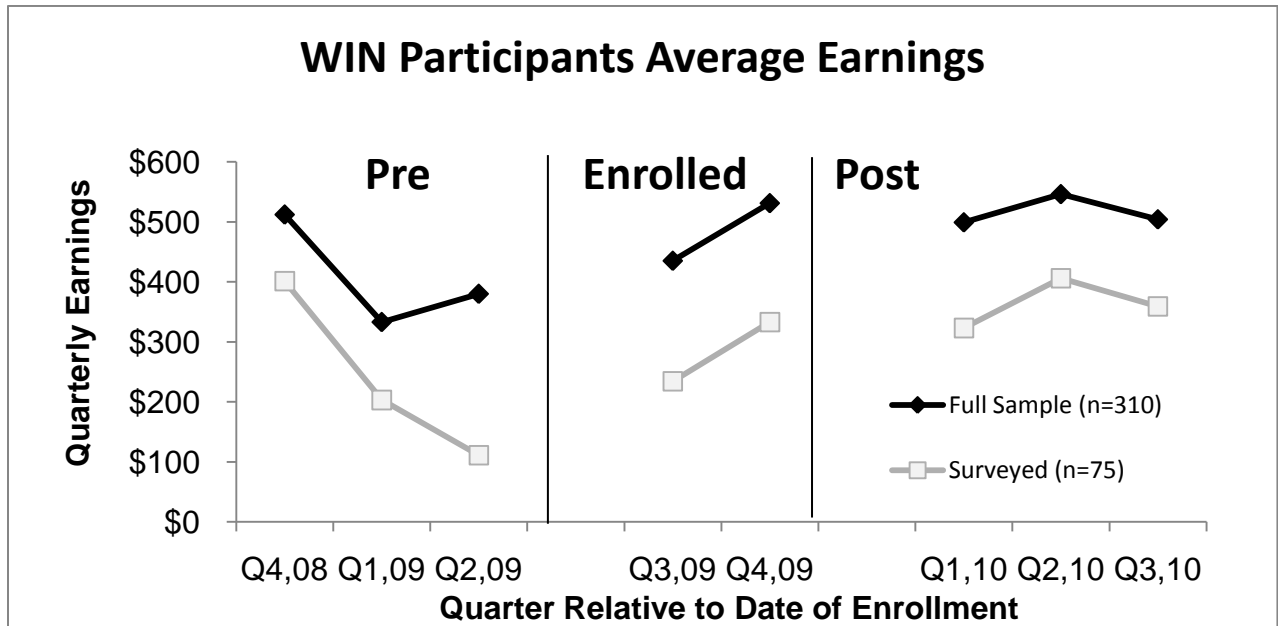


Figure 5 shows the total earnings for the three quarters prior to WIN program enrollment and the three quarters after enrollment for both the full WIN service group and those surveyed. The increase in wages for the full service group represents an increase of 20% and for the surveyed group an increase of 32%.

Figure 5:

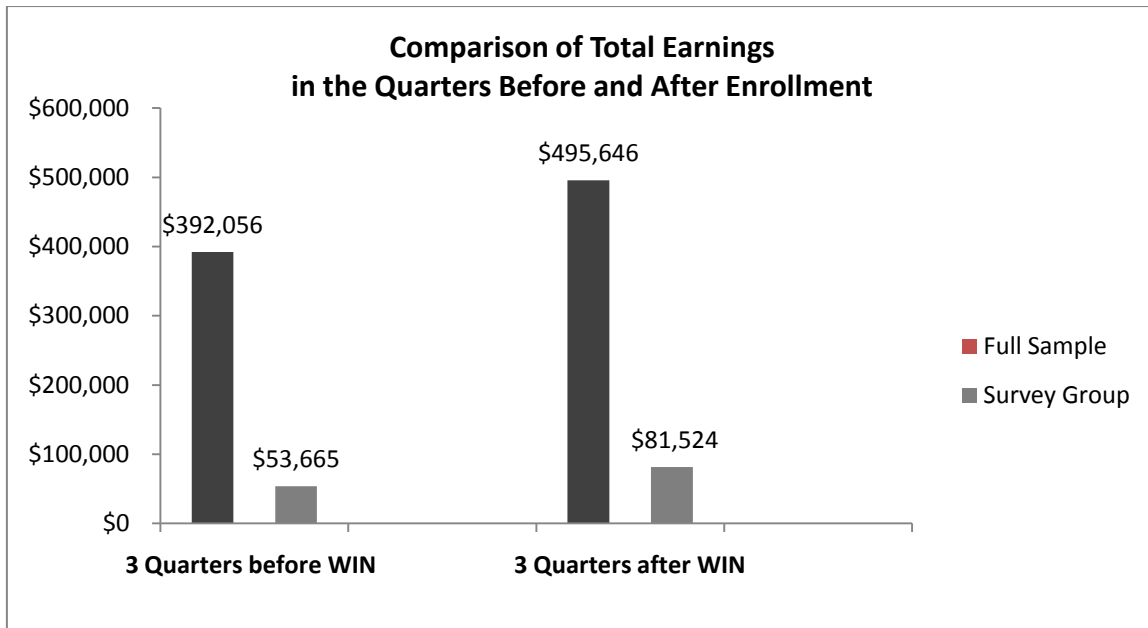


Figure 6 shows only those who worked every quarter. The number of individuals in the full sample who worked each quarter reached the highest number during the second quarter after enrolling for WIN services, maintained at that level for a quarter and then began to trend down. A similar pattern is seen for those in the surveyed group.

Figure 6:

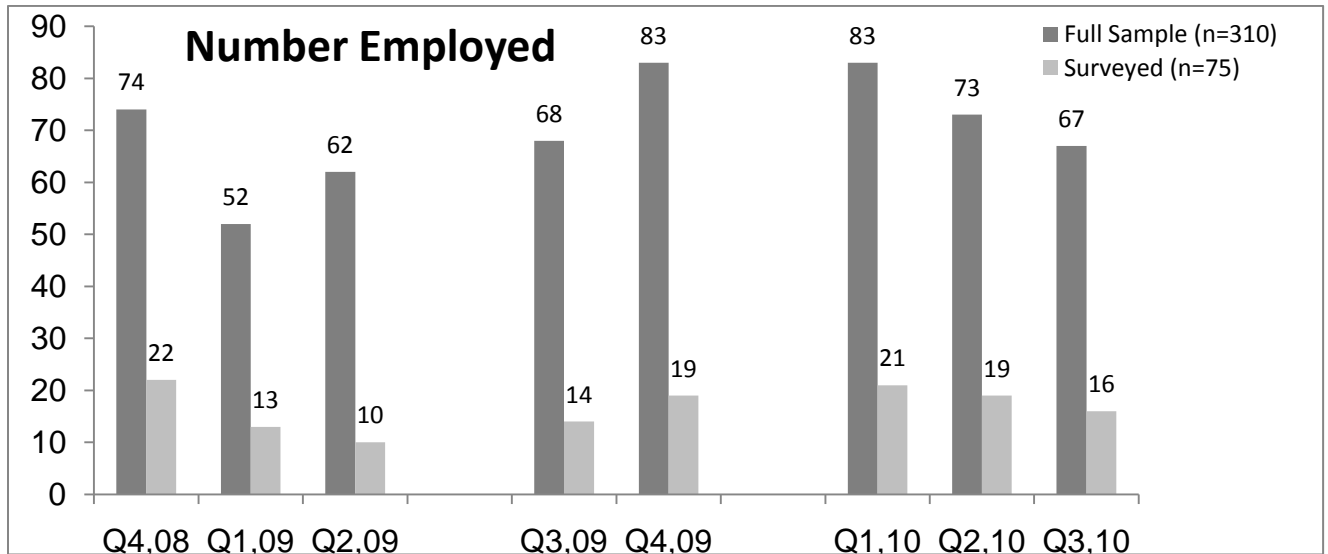


Figure 7 shows the percent of individuals in the full service group and the surveyed group who were employed before and after receiving WIN services. The increase represents a 3% and 5% increase for the full and surveyed group, respectively.

Figure 7:

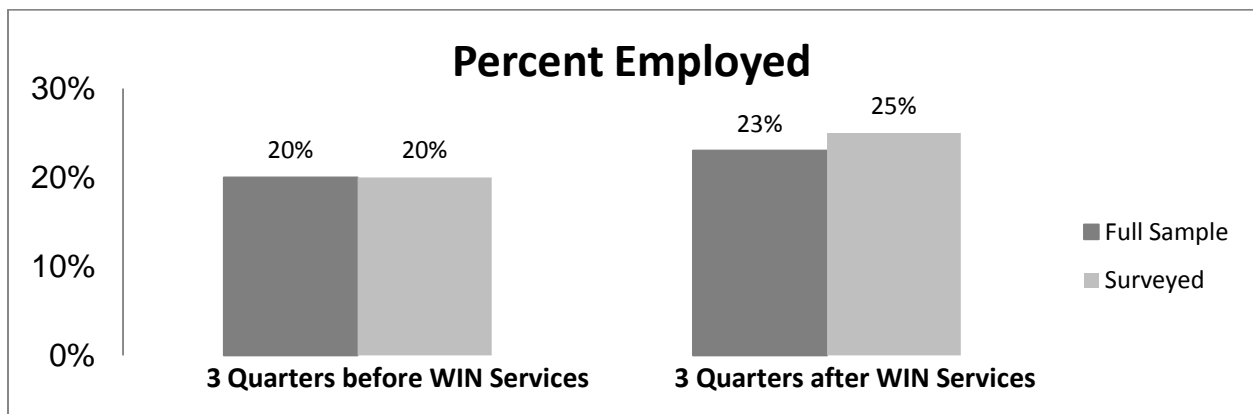


Figure 8 shows the total hours worked each quarter for the full and surveyed groups. A significant jump in hours occurred and was maintained after WIN services began for both groups.

Figure 8:

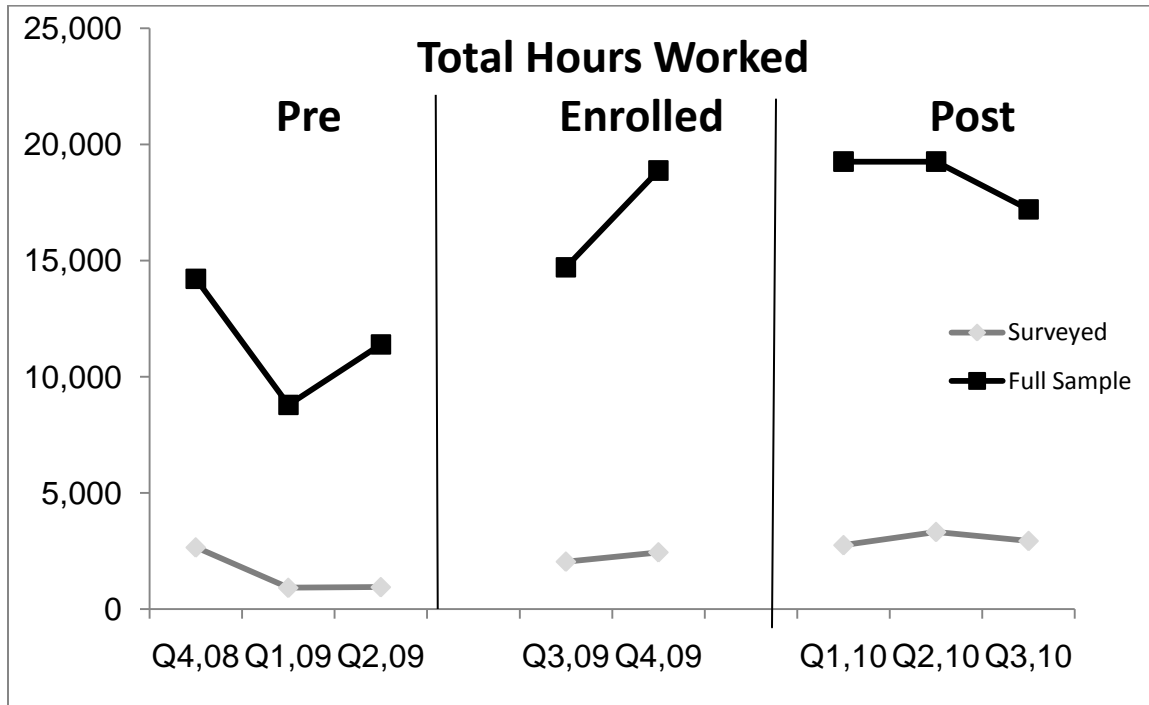
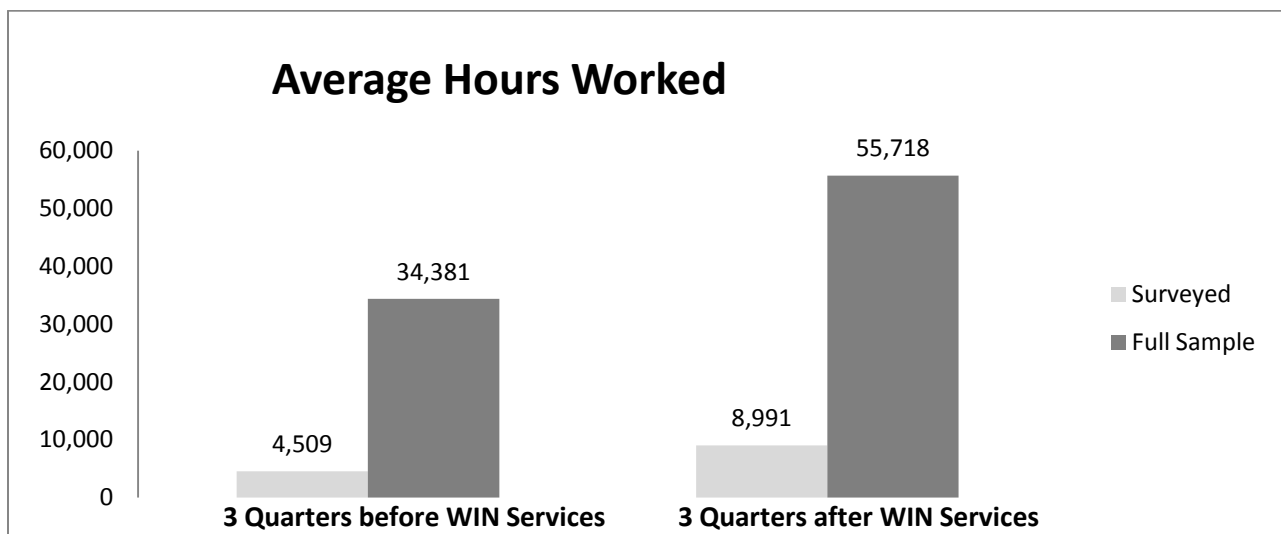


Figure 9 shows the total hours (summed across the 3 quarters before enrollment and 3 quarters after enrollment) worked for the full service group and the surveyed group. The percent increase in hours was 38% for the full service group, and 50% for the surveyed group.

Figure 9:



## **Oregon's Work Incentives Network: Description of Two Reviews Prior to 2010**

### **Satisfaction Survey -- June 4, 2009**

WIN staff developed a satisfaction survey and mailed it to 1,050 WIN participants. 19% were returned. 85-86% said WIN staff answered all my questions about benefits and made it easy to understand how working would affect my benefits. The question "After Receiving WIN Services, I..." 20% reported starting work, 21% that they made more money, and 38% now want to work.

### **Synopsis of Work Incentives Network Administrative Data Report – Review January 3, 2010**

#### Data Sources:

A data analysis was used to measure the effectiveness of the Oregon Work Incentives Network (WIN). This study included all the participants who had received benefits counseling within five calendar quarters following program enrollment quarter. The data provided was for a period beginning four calendar quarters before participant program entry (4/1/2006 to 9/3/2007) to the end of five calendar quarters (10/1/2007 to 12/31/2008) following enrollment. Employment outcomes data was from the State of Oregon Unemployment Insurance records. Food stamp and TANF data was from Division of Children, Adult and Families, Oregon Department of Human Services. All Medicaid data are from the Division of Medical Assistance Programs, Oregon Department of Human Services.

#### Findings Summary:

Benefits counseling was associated with an increase in employment rates for WIN participants. This coincided with a post-enrollment decrease in Medicaid and TANF public benefits. The degree of improvement in outcomes, especially in post WIN services employment rates led to the conclusion that work benefits counseling can help participants improve their employment outcomes.

Overall, benefits counseling participants posted a 4% gain in employment outcomes between the quarter they entered the program and the fourth quarter thereafter. WIN Participants who were working experienced a 22% increase in wages. Public benefit utilization decreased in both Medicaid and TANF after enrollment in WIN.

#### Concerns and Next Steps:

During this 2009 study, Oregon began to experience heightened unemployment rates, among the highest in the county. We also noted that only 17% of the participants in this study became employed or increased their wages after receiving WIN services. Plans were made to continue study of Oregon's WIN program, beginning with the survey that was reported at the beginning of this document.

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