**Benefits Planning Cross-Advisory Body Workgroup**

**Meeting Minutes- DRAFT**

August 23, 2023

**Workgroup Members:** Benjamin Aviles (Co-Chair), Stephanie Crist, Carrie England, Jennifer Fischer, Gina Griffith, Nicholas Love, Michael Luna, Jessica Popjevalo, Naomi Ramirez, Paula Tobler, and Taylor Winchell (Co-Chair)

1. **Welcome and Introductions**

Meeting began at 2:05 p.m. and quorum was established.

1. **Approval of July 2023 Meeting Minutes**

It was moved/seconded (Tobler/Luna) to approve the June meeting minutes. Motion was approved by a 4-0-2 vote. (Yes – 4, Aviles,

Luna, Popjevalo, and Tobler); (No – 0); (Abstain – 2, Ramirez and Winchell)

1. **Development of Policy Recommendations and Structure of the Report**

Co-chairs shared that the focus today will be on policy recommendations, and they began by sharing the broad general recommendation categories to be developed:

* State versus federal – overall common issues
* General recommendations
* Benefits planning
* Lack of access to benefits planning resources – Enhance existing systems and create new opportunities.
* Outreach - key points for people with disabilities
* Workforce

The Workgroup discussed the policy recommendations and raised additional topics.

* Definition of what we mean by benefits planning was brought up. Definitions mean different things to people and programs.
* Benefits planning can mean getting the benefits you need and how they all work together. That is different than helping someone apply for benefits. Benefits planning should not be separated out from employment services.
* One definition of benefits planning is SSA or social programs including WIPS, medical, Section 8, and CalFresh.
* One goal of report should be to tackle misinformation and create streamlined processes.
* Develop SSA partnership.
* Training should be available within systems for staff to connect people with existing resources and services.
* Members should focus on actionable items.
* Discussion occurred on how to address needed reforms to SSA and how the Workgroup can influence SSA.
* There is no current funder of DB101 and unless there is funding it will no longer be available next year. Members discussed a policy recommendation/
* Workforce could play a role with identifying people with capacity to do benefits planning work to help fill open positions and then learn how to fund those positions.
* Tiered approach to benefits planning.
* Benefits planning as part of employment services.
* CalABLE accounts and benefits planning (there was a discussion on CalABLE accounts and some of the terms)
* Discussion on training regarding overpayments to eligibility workers.

After this discussion, there was a consensus to hold a meeting to work on policy recommendations. The meeting would use breakout rooms to determine language of policy recommendations and information for the report. Discussed option of holding several public meetings on specific topics or one meeting with breakout rooms.

1. **Agenda Items for Future Meetings**

A meeting will be scheduled to discuss the following three topics in breakouts.

* Lack of access to benefits resources and planners
* Marketing and outreach
* Workforce issues
1. **Public Comment**

There were no public comments.

1. **Adjournment**

Meeting adjourned at 3:25 p.m.