**Benefits Planning Cross-Advisory Body Workgroup**

**Meeting Minutes- DRAFT**

October 25, 2023

**Workgroup Members:** Jennifer Fischer, Aparna Kommineni, Jessica Popjevalo, Taylor Winchell (Co-Chair), Leza Coleman

1. **Welcome and Introductions**

Meeting began at 2:08 p.m. and quorum was established.

1. **Approval of August 2023 and October 4th Meeting Minutes.**

Meeting minutes were deferred due to no quorum.

1. **Mapping of Various Benefits**

Executive Officer provided a concept for mapping various benefits. Members provided feedback to the document, including:

* Add legal services.
* Income eligibility can be added but can get difficult.
* Link to benefits.
* Add brief description of benefit.
* Add housing and subsidies.
* Add type of disability for specific targeting
* Supportive or non-supportive services

1. **Continued Discussion of Policy Recommendations for the following:**

Workgroup members went into small groups for the continued discussions in breakout rooms. There was a report out on the group discussions.

**Lack of Access to Benefits Planning Resources and Planners**

Members discussed some of the areas:

* Lack of access issues
* Consistencies across different employers
* Checks and balance systems.

**Marketing and Outreach for Benefits Planning**

Members discussed areas:

* It was discussed to do an outline of different phases/stages and the messaging for each stage.
* For the third stage of career, messaging on overpayment education needs to be about wage reporting requirements.
* Using AI to see if there is a role for navigating services.
* Using multimedia and plain language for materials we are recommending.

**Workforce Issues**

Members discussed following areas:

* Discussed the scope of what workforce means.
* Implications across employment programs and frame the recommendations differently for programs for people with disabilities.
* Not all local workforce development areas will be able to hire a benefits planner so partnerships are needed and ensure staff is at knowledgeable as to where to direct clients for the benefits planning information.
* Benefits planning that CCEPD has already developed are strong recommendations that can be used to help serve and connect people.

Everyone was asked to send the notes to the Executive Officer for inclusion in document for November.

1. **Agenda Items for Future Meetings**

No new agenda items were added. The November and December meetings were combined into one meeting on November 30.

1. **Public Comment**

There was no public comment.

1. **Adjournment**

Meeting adjourned at 3:20.