**Benefits Planning Cross-Advisory Body Workgroup**

**Meeting Minutes- DRAFT**

October 4, 2023

**Workgroup Members:** Kerry Chang, Stephanie Crist, Jennifer Fischer, Gina Griffith, Aparna Kommineni, Jessica Popjevalo, Paula Tobler, Taylor Winchell (Co-Chair), and Scarlet VonThenen

1. **Welcome and Introductions**

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

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

Members joined one of three breakout rooms for 60 minutes with the following members in each section:

* **Lack of Access to Benefits Planning Resources and Planners:** Gina Griffiths, Paula Tobler, and Scarlett VonThenen
* **Marketing and Outreach for Benefits Planning;** Stephanie Crist, Jessica Popjevalo and Taylor Winchell
* **Workforce Issues:** Kerry Chang and Jennifer Fischer, and Aparna Kommineni

After one hour the members all returned to the main meeting. Members were asked to share the conversations in the sub-groups with the entire Workgroup.

Workforce Issues:

* There is a limited scope in this area and the information needs to be integrated into service delivery.
* Benefits planners would be great to have but not something can be done by everyone.
* There is ability for movement and recommendation around capacity development for workforce mainstream staff.Staff should know enough about benefits planning to provide context for services they are providing and be able to connect consumers with benefits planners.
* Education piece is what is important.

Lack of Access to Benefits Resources and Planners

* Individuals who first find out if they are eligible should get the information on benefits planning resources at the same time.
* There are big issues with Social Security Administration that could be changed by revamping technology to capture information timely and reported accurately. Technology should capture work incentives.
* Develop benefits planning service codes to assist with benefits planning.
* Frontline people should have some level of training and competency at least at a base level.
* Fund DB101.

Marketing and Outreach:

* Identify touchpoint people for messaging when receiving common benefits.
* Have information at the touchpoints to help family members or individual to access the benefits.
* Information can come from different places and in different ways.
* Children at younger ages should receive resources on navigating benefits and employment.
* Members discussed how to approach and overcome overpayment issues and where those supports are.

There was a question about guardians and representative payees, and if anyone had any additional information on this topic. More information is needed on those two areas.

1. **Agenda Items for Future Meetings**

* Meeting schedule will change for the next couple of months into one for both November and December. Members agreed to keep the October meeting.
* The next meeting will include breakout sessions and mapping of benefits.
* Meetings can be fully virtual again until December 30. Some new elements will go into effect on January 1, 2024. More information will be shared in coming months.

1. **Public Comment**

There were no public comments.

1. **Adjournment**

Meeting adjourned at 3:45 p.m.