**Benefits Planning Policy Recommendations**

At the August 2023 meetings, Members agreed to focus on policy recommendations in three areas: lack of access to benefits resources and planners, marketing and outreach, and workforce issues.

To assist with the process, the CCEPD Executive Officer suggests the following:

* Policy recommendation should be high-level and capture systems approach for change based one program/system or multiple systems and programs.
* As you write the policy recommendation, consider how it resolves an issue and what it seeks to address. Please state that, and determine what additional information is needed.
* Also, state whether policy recommendation needs policy, legislative changes, or additional funding. For now, Members should consider that as part of policy recommendation. Goal of the report is to both identify issues and make recommendations for state entities. More decisions will be made by the Workgroup as recommendations are further refined.

The goal of the report is to educate policymakers not working with people with disabilities on the barriers caused by variety of benefits requirements and employment. Policy recommendations and report will be shared with both Health and Human Services and Labor and Workforce Development Agencies.

The introduction of the report will also include a definition of what benefits planning are and how used for people with disabilities and what long-term services and supports mean for people with disabilities.

**Identification of areas of concern and affects of managing employment and benefits.**

* People with disabilities choose not to take a promotion or go full-time due to asset and income limits making it cost prohibitive for health care and supports.
* Culture change is needed to ensure benefits planning is a part of employment services and integrated in all systems and programs.
* Definition of benefits planning and how benefits planning is discussed with people with disabilities and their families should be reframed. Benefits planning is to help people with disabilities select the life and career they want while determining supports needed.
* Mandates for various benefits are in multiple state and local entities, making it difficult to have consistent information for people with disabilities and their families or guardians. This leads to misinformation and can be detrimental in loosing benefits or other career choices.
  + This can be illustrated with stories from people with disabilities.
* Overpayment letters cause traumatic experiences to individuals. Although federal issue, Workgroup needs to point out this ongoing issue.
  + This can be illustrated with stories from people with disabilities.
* There is lack of instant information and navigating all systems and SSA becomes a deterrent to employment.
* Discussion of asset limit reforms in Medi-Cal and its affects for people with disabilities.
* Discuss income eligibility and asset limits and its affects to people with disabilities.
* People with disabilities have higher expenses, throughout the life span, due to support needs.

**General Policy Recommendation**

Based on conversations from August and prior meetings, these can be overarching policy recommendations. These policy recommendations can be matched with areas of concern above when drafted as report.

* Benefits planning should be a part of employment services in all programs.
* Support California’s efforts to evaluate income eligibility and asset limits for health and human services programs.
* Encourage State of California have a more robust partnership with the Social Security Administration and support efforts to streamline processes for people with disabilities.

The CCEPD Executive Officer developed policy recommendations based on conversations from August. Proposed policy recommendations are meant to provide a starting point for the conversations.

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

* Leverage existing materials, tools and create general resources, including general information on overpayments to be shared with multiple entities.
* Develop a tiered and integrated approach to benefits planning. State models, such as Arizona, Minnesota, and Michigan, can be explored to offer ideas to the State of California. This will include existing tools and programs. The State of California would need to map, identify, coordinate, and fund potentially, a different structure.
* Support changes to Competitive Integrated Employment Local Partnership Agreements to incorporate benefits planning into its written agreements.

**Marketing and Outreach regarding Benefits Planning**

Think about key touchpoints for people with disabilities and how to educate people with disabilities and families/guardians.

* Develop an ongoing marketing and outreach campaign on benefits planning to increase awareness of work incentives for people with disabilities.
* Incorporate benefits planning into other campaigns for children (younger than transition-age) and parents/guardians.
* Incorporate benefits planning into financial literacy and CalABLE efforts.
* Develop strategies to educate public guardians and rep payees.
* Develop strategies to educate Local Education Agencies and medical professionals.

**Workforce Issues**

* Build capacity of benefits planners in multiple programs and create career pathways to ensure a continual pool of individuals are trained.
* Train eligibility workers on the basics of what occurs when an overpayment letter is received.