**Benefits Planning Cross-Advisory Body Workgroup**

**Meeting Minutes- DRAFT**

July 26, 2023

**Workgroup Members:** Benjamin Aviles (Co-Chair), Stephanie Crist, Jennifer Fischer, Michael Luna, Anne Osborne, Jessica Popjevalo, and Paula Tobler

1. **Welcome and Introductions**

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

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

It was moved/seconded (Fisher/Popjevalo) to approve the June meeting minutes. Motion was approved by a 6-0-0 vote. (Yes – 6, Aviles,

Fischer, Luna, Osborne, Popjevalo, and Tobler); (No – 0); (Abstain – 0).

1. **Transition-Aged Youth Panel Discussion**

Panelists were introduced by Co-Chair Aviles and began the discussion by asking questions. Panelists were:

* Ray Bueche, Coordinator-Special Education and Administrator-[Adult Transition Program](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.svusd.org%2Fschools%2Falternative-schools%2Fesperanza&data=05%7C01%7Cmaria.aliferis-gjerde%40dor.ca.gov%7C814210e4c4db4575adc508db7266db78%7C19ed70549d9743c792b16781b6b95b68%7C0%7C0%7C638229558368283719%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=qFUa0YFaxeOm8thUTO8aTtk9Axm9eXwMLElbPPhEP%2BU%3D&reserved=0), [Career Start](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.svusd.org%2Fprograms%2Fcareer-start&data=05%7C01%7Cmaria.aliferis-gjerde%40dor.ca.gov%7C814210e4c4db4575adc508db7266db78%7C19ed70549d9743c792b16781b6b95b68%7C0%7C0%7C638229558368283719%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=b9licTV82ZSAcP6zBooo0nFFu%2BKL%2BgsZ4uiq9eGqN7I%3D&reserved=0)
* Luis Mendoza, Job Development Specialist/Grants Support/Ticket to Work, Transition & Vocational Services, Whittier Union High School District
* Rene Melton, Saddleback Valley Uunified School District/Career Start
* Linda O’Neal, Transition Specialist, Chapman University, Thompson Policy Institute on Disability

Talk about how they get work with youth and family.

* Schedules meetings to help them apply for benefits, help with referrals, and answer questions they may have. Basically, take the time to build trust. Keeps close relationship with the family and keeps in contact with youth while in program. (Mendoza)
* Many clients are referred to her. Holds youth resource fairs a few times a year. Provides basic information on the differences between SSI and SSDI. (Melton)
* Catches youth through financial literacy and develops resources for them as part of their work experience. (Bueche)
* Began her work as transition specialist and learned strategies to help students and families on the road to work and managing benefits. Issue of overpayments and fear of losing benefits continue to be a barrier. DOR benefits planners and WIPAs are a great support to youth and their families. (O’Neal)

What are challenges for transition aged youth and their families?

* Education for families and students is crucial for learning which pathway to navigate. People are happy with their cash payment and are afraid to make changes even if it means they could have more money. (Bueche)
* Funding sources are needed to pay for dedicated staff. (Bueche)
* Lots of misinformation on benefits planning. Social Security Administration (SSA) also does not have knowledge of transition-aged youth. Gaining trust of parents is so important to this work. (Mendoza)
* During Covid pandemic, I saw an increase of guardianships for youth. It has caused a lot of problems because guardians need to learn all these systems quickly. (Mendoza)
* Paperwork loss and not responding to paperwork in a timely manner causes problems, especially for those with intellectual disabilities. (Mendoza)
* People don’t understand the work incentives and fear of losing benefits is so high. Need to educate people on the basics and understanding of the forms and why so important. (Melton)
* Education is key for families. The need for general resources is high, especially for work-based learning. (O’Neal)
* Most special education teachers receive no information on benefits and need training and resources. (O’Neal)

What strategies can be developed to help families with their students and benefits planning?

* More community resources and liaisons within systems serving youth to have access to benefits planners. Every high school and career center should have benefits planner and general resources available to youth. (Mendoza)
* Benefits planners are a special breed and need skill and patience to deal with issues faced by families and youth. It can be a stressful job and there is high turnover. (Mendoza)
* Discussed the training needs and how to present information to families and youth so they can understand and retain the information. It is overwhelming. (Melton)
* More information on SSA website for parents and youth. Online application has been helpful but still very complicated. (Melton)

Other discussions included:

* Online application and ease of it.
* Training for benefits planners and ongoing training needed.
* Funding of benefits planning positions, difficulty of finding people to fill positions, and low pay makes it difficult to have consistent staffing. (Bueche)

Do they have suggested policy recommendations for benefits planning?

* More funding is needed to serve students regarding benefits planning. Think about linking this to ongoing education funding through the legislative process. (Bueche)
* Rates for benefits planning and services to students have not risen. (Bueche)
* Extend and include benefits planning into the ITP and IEP process for students. (Bueche)
* Discussion of workforce needs of benefits planners.
* Encourage SSA to make some changes, including listing work incentives on the application, case management system, hotline to help individuals with overpayments and staff to navigate appeals process. (O’Neal)

1. **Takeaways from Panel Discussion**

Members discussed their takeaways from the discussion:

* Benefits planning and planners are important and there might be funding for the training, but not funding for the positions. Benefits planners have specific skill sets and work can be complicated.
* Discussion on how to make people expect overpayments and know how to deal with them. Agreed that it creates stress and anxiety.
* Discussion on how to improve information to people and combat misinformation.
* Think about the linkages between programs and information for clients and families.
* How to reorganize existing resources in the state and have coordinated approaches.

1. **Review of Report Outline**

Executive Officer Aliferis-Gjerde provided an overview of the report, its possible messages, and layout. More work will be done in August to develop the policy recommendations and further work on the report.

Members suggested that the report should discuss overpayments. There was a discussion about how the workgroup can reach out to the SSA on several issues that panelists have discussed over the course of monthly meetings.

1. **Agenda Items for Future Meetings**

Discussed meeting schedule for August, September, and October. Meeting in September was cancelled. Members also acknowledged the passage of the Americans with Disabilities Act.

1. **Public Comment**

No public comment.

1. **Adjournment**

Meeting adjourned at 3:51 p.m.