**Benefits Planning Cross-Advisory Body Workgroup**

**Meeting Minutes- DRAFT**

June 28, 2023

**Workgroup Members:** Benjamin Aviles (Co-Chair), Kerry Chang, Lisa Coleman, Stephanie Crist, Jennifer Fischer, Gina Griffiths, Michael Luna, Anne Osborne, Jessica Popjevalo, Naomi Ramirez, Scarlett VonThenen, and Taylor Winchell (Co-Chair)

1. **Welcome and Introductions**

Meeting began at 2:04 p.m. and quorum was established.

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

It was moved/seconded (Popjevalo/Osborne) to approve the May Meeting Minutes. Motion was approved by a 5-0-4 vote (Yes – 5, Aviles, Chang, Osborne, Popjevalo, and Winchell) (No – 0) (Abstain – 4, Fischer, Luna Ramirez and Tobler).

1. **Discussions with Clients/Family Managing Benefits While Pursing Employment**

Chair Winchell welcomed the panelists, Melissa Cory, Taylor Carty, and Candis Welch, to the meeting. The Chair asked questions and panelists answered questions.

Asked to describe their experience with Benefits Planning.

* Carty– First experience was in college when she had to learn about student income wage earner. She expressed how lucky there was assistance from the Department of Rehabilitation (DOR).
* Cory– She is a conservator for her son. Never had much information at first except some communication from Supplemental Security Income (SSI) reviewing his benefits. In Spring of 2021, her journey began with an overpayment letter. $16,000 was received along with a letter saying he was no longer disabled and eligible for payments. She had a tough time finding answers.
* Welch –Had a similar experience and little bit of both the previous panelists. She was first introduced at 18 by DOR counselor. However, she received an overpayment of $27,000. She described how traumatic the experience was.
* Discussion of how traumatic and unjust the system and overpayment letters are.

Follow up questions were asked:

* Does the experience of overpayment help make you motivated to find employment? Welch was more motivated to want to work full time and ensure she had employment that could help her live her life. For many though, it puts people in awkward positions. For Carty knowing which resources were available to work was important, she did not have to deal with overpayments.
* As a parent, where are you finding your resources and the best information? Other parents are a good source of information. Resources from state agencies don’t always give consistent information. There is a lot of confusion and misinformation. Regional Centers are a good source of information but not everyone is in contact with them.
* For those that received overpayment notices, were you aware of the Protection and Advocacy for Beneficiaries of Social Security (PABSS) program that could assist with overpayment notices? Candis was not aware of any. When Melissa called for advocacy, she was only told to go online and fill out a form.
* Discussion occurred of how common lack of information is. Panelists felt the programs force poverty and policies and laws need to change.
* Discussion on how people with disabilities are not saving for retirement, and that salaries go to household needs, or towards insurance or care costs.

When you started this process what do you wish you knew?

* Cory– having one agency that could have organized everything. Knowing who to call or where to start.
* Welch– Would have liked to have someone that was with her in the beginning. There needs to be a program where there is a possibility to exit for those that want to move on with education and careers that don’t meet the limits. Maybe an exit mentorship program to help guide them out of the system. Everyone should know about DOR and their educational services.
* Carty – Getting emersed in education is great but with all the limits, many could give up.
* Discussion occurred on how generational planning is needed for people with disabilities.

1. **Takeaways from Panel Discussion**

Members were asked to share their key takeaways. The following were shared:

* Potential policy recommendations for access to benefits, education and outreach, and workforce training. Additionally, overpayment information should be developed. Explore whether the State can provide support to those who have incurred overpayments.
* Discussion on whether the State can provide supplemental support to reduce asset limits or increase monthly amount.
* Educating on utilization of work incentives. Meet with students and their parents early enough.
* CalABLE offers resources that not everyone knows about. The need to start when youth are young. Different messages from different organizations, this should be something that all our agencies need a consistent message to families. Discussion of how Social Security Administration should be involved. Are there state departments that have an existing relationship with Social Security Administration (SSA)? CalABLE is currently working with SSA public affairs officers. It may be possible to have one of them discuss with us in the future.
* Other discussion included how Department of Rehabilitation has working relationships with SSA locally. Developed a webinar series on a variety of aspects of work incentives.
* Discussed on having a policy recommendation or best practice document on how to work with SSA.
* DB101 should have a page with information about overpayments.
* Develop some material with PABSS.

1. **Reports from department of Developmental Services and Department of Rehabilitation**

Department of Developmental Services reported on the following:

* Employment Grant went to 45 projects for new and innovative pathways to employment. Grant number 22 is funding benefits planning for paid internship participants.
* Employment Workgroup Meeting – there is more information on the Career Pathways and Competitive Integrated Employment – Individuals will have a dedicated person for benefits planning and how it can affect their employment and benefits.

Department of Rehabilitation reported on the following:

* New pilot began in June in three districts. It expands work incentive services. All consumers receiving SSI or SSDI will receive extensive information, focusing on early intervention of providing information as early as possible.

1. **Discussion of Next Steps and Report Outline**

The following next steps were discussed:

* For the July panel, it will focus on transition-aged youth.
* CCEPD Executive Officer met with State of Michigan and will meet with the State of Minnesota.
* In July, meeting with California Association for Social Rehabilitation Agencies (CASRA) to discuss benefits planning.
* Reminder to everyone that starting July 1, there are Bagley Keane Open Meeting Act changes and meeting locations will have to be noted. DOR locations will be available.
* Agenda item will focus on report starting next month.

1. **Agenda Items for Future Meetings**

Members suggested a training on PABSS.

1. **Public Comment**

No public comment.

1. **Adjournment**

Meeting Adjourned at 3:39 p.m.