**Report on Benefits Planning**

**July 2023**

**Introduction**

At the June 2023 Workgroup meeting, the Workgroup discussed the need to develop an outline for the report. Further work is needed to develop policy recommendations and to write aspects of the report. Policy recommendations will be framed through problem, possible solutions and feasibility of recommendation (i.e. budget, legislation, policy and economic climate). Lastly, there are topics that the Workgroup has not discussed yet and outline provides some suggestions.

In August and September, the monthly meetings will be dedicated to working on policy recommendations and working on chapters of the report.

**Executive Summary**

* Highlight key points from the report.

**Introduction**

* Overarching themes from the conversations
	+ Overpayments are certain like death and taxes.
	+ Highlight life of poverty over economic independence.
	+ Highlight how people need to have a big salary to cover expenses that throughout the lifespan.
* Reason for the report

**Stories and Information on Why Managing Benefits and Employment**

Stories and information will be throughout the report not in one section. However, these are some ideas to incorporate into the report.

* Use personal stories from individuals to highlight.
* Need prominent members of community and use information from panelist.
* Highlight various situations people may face, such as conflicting asset and income limits, misinformation, or myths.
	+ Living standards are high in California vs rest of .U.S.
* Discuss that people with disabilities come through multiple doors seeking assistance.

**Benefits Planning**

Each section will have an overview of the issue and policy recommendations.

* Lack of access to benefits planning (program fragmentation)
	+ Need to leverage resources to create consistent messaging and information.
* Marketing and outreach
	+ Rethink touchpoints where youth and families receive information (non-disability), such as health care offices, local education agencies, First 5 Commission.
* Workforce education and training
	+ - Consistency and access to information among programs serving people with disabilities.
		- Discuss models from other states.
		- Use DB101.
* Discussion of transition-aged youth
	+ Older youth making decisions about career.
	+ Early access for youth, benefits planning and financial literacy needs.

**Health Care**

Each section will have an overview of the issue and policy recommendations.

* Highlight Working Disabled Program
	+ Need for ongoing marketing to counties.
	+ Increase knowledge to providers and county employees about program.
* Highlight how asset limits help people with disabilities and income eligibility may still affect participation. Do some math and show differences in programs.

**Long Term Care Services and Supports (LTSS)**

Each section will have an overview of the issue and policy recommendations.

* Discuss the various needs that people have.
	+ Short-term and intermittent
	+ Lifespan needs
	+ Expensive
* Discuss IHSS and how people with disabilities are using the program.
* Highlight work in the aging community and other Master Plan on Aging proposals.
	+ LTSS program – people with disabilities need a program focused on lifespan.
	+ AB 567 Feasibility Report

**Federal Issues**

Each section will have an overview of the issue and policy recommendations. Members will decide how to address federal issues and what to highlight in the chapter.

* Messages
	+ Highlight that program was designed in earlier era and needs updating to fit current needs.
	+ Highlight the tension between “trust”, “did everything right and now paying for it,” and how two programs sending two different messages on employment.
	+ Asset limit changes.
* Discuss what are state-level strategies and what are federal issues, such as overpayments.

**Other Issues**

In this section, topics were included that Members have mentioned in Workgroup meetings or other CCEPD meetings. Workgroup Members will decide what additional to pursue for the report.

* Financial literacy
	+ CalABLE and linkages to programs.
	+ Retirement and long-term care for people with disabilities.
* Rep payees and public guardianships – lack of understanding about benefits planning and employment and how in some cases need to be involved.
* Workers’ Compensation and interactions with benefits planning
* Complexity of income and asset eligibility for housing (depending on program).

**Appendix**

* Discuss panels, informant interviews and surveys conducted for information.
* List of literature reviewed.