**Benefits Planning Cross-Advisory Body Workgroup**

**Meeting Minutes- DRAFT**

March 26, 2024

This meeting was held via teleconference within the meaning of Government Code Section 11123.5.

**Workgroup Members:** Leeza Coleman (Virtual),Jennifer Fischer, (Virtual), Michael Luna (Virtual), Jessica Popjevalo (Virtual), Scarlett Von Thenen (Virtual), Candis Welch (Virtual), and Taylor Winchell (Virtual with Attendant)

1. **Welcome and Introductions**

The meeting began at 2:04 p.m. and a quorum was established.

1. **Approval of February 2024 Meeting Minutes**

It was moved/seconded (Coleman/Welch) to approve the February meeting minutes. Motion was approved by a 7-0-0 vote. (Yes – 7, Coleman, Fischer, Luna, Popjevalo, Von Thenen, Welch, and Winchell); (No – 0); (Abstain – 0).

1. **Breakout Rooms to Review Benefits Planning Report**

Executive Officer updated the workgroup on what was changed based on feedback. There was no additional information from states on income eligibility. Members went into two breakout rooms to review the report.

Members reviewed the report and provided the following report after meeting in breakout rooms.

Group 1:

* Members discussed how the framing should be evaluated regarding choosing employment over benefits.
* SSDI does not have resource limits.
* Age range should be above 64 because people are working longer.
* Beneficial to get statewide WIPA data. There is less access to DB 101 but that doesn’t mean that the information isn’t being accessed elsewhere.
* More information to get data for different needs of individuals with IDD.
* Include sentence on how some professionals sharing bad, inaccurate, and outdated information. This leads to advising people on employment choices.
* Better description for low paid benefit planners.
* Clarification is needed on the data elements for benefits planning.
* Regional centers provide more guidance than actual planning for benefits.
* Benefits planning for youth should start at 16, not 18.
* Discussion included how to train caregivers to look down the road for future services that could be needed. Seeds of expectation can be planted as soon as grade school.
* More inclusive workforce and how it benefits employers.
* Clarify 4 life stages, 5 stages listed.
* Retirement information should be given while still working and not wait until time to retire.

Group 2

* Many of the findings were like Group 1.
* People with disabilities can make their own decisions.
* Include more programs for benefits planning.
* DB101 – more information on funding is needed.
* Discussion on budget deficit – acknowledging that now may not be the right time but could happen later.
* Listing policy recommendations at the beginning of report.
* Review language used to make sure it is consistent throughout the report.
* Unified outreach and marketing.
* Create a glossary of terms and an appendix on variety of resources.

1. **Discussion of Data Needs for Benefits Planning Report**

The Executive Officer provided an overview of the benefits planning survey and discussed the questions included.

Members provided the following feedback:

* Add a definition on benefits planners.
* Add question on positions available or filled.
* Discussed avoiding duplication and added position of person completing survey.

1. **Agenda Items for Future Meetings**

No new agenda items.

There was a discussion on what the next steps will be, whether regulation or legislation will be needed. Recommendations will be for department-level policies or procedures. Agencies can be asked to report back after getting the report.

1. **Public Comment**

There were no public comments.

DDS just released the pilot information that will include benefits planning for Career Pathways Navigator.

1. **Adjournment**

The meeting adjourned about 3:30 p.m.