**Benefits Planning Cross-Advisory Body Workgroup**

**Meeting Minutes- DRAFT**

May 28, 2024

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

**Workgroup Members:** Jennifer Fischer, (Virtual), Michael Luna (Virtual), Jessica Popjevalo (Virtual), Anne Osborne (Virtual), Candis Welch (Virtual), and Scarlett VonThenen (Virtual)

1. **Welcome and Introductions**

The meeting began around 2:00 p.m.

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

Meeting minutes were deferred.

1. **Survey Information Update**

CCEPD staff member Zak Ford provided an update on the survey results. Ford reported that while 70 entities responded to the survey, the survey did not provide conclusive information from the three programs (America’s Job Centers of California, Independent Living Centers, Regional Centers). Only 11 respondents provided benefits planning services for people with disabilities and only nine provided any information on services. Discussion occurred on whether more targeted approaches were needed. Questions were asked on what information has been received for benefits planners. Unfortunately, the sample size of respondents was not large enough to identify any consistent patterns and/or details.

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

The Executive Officer, Maria Aliferis-Gjerde, provided an overview of what has changed:

* Some of the language for benefits planning section was condensed and data that was not needed or if repetitive was removed.
* Recommendations were clarified.
* Additional background for health care and long-term services and support was added with additional data.
* Executive summary with policy recommendations was added.
* Table of contents was added including a glossary of terms and literature review.
* Discussed how final report will incorporate graphics.

Members were separated into breakout rooms to discuss if there is agreement on recommendations, language in report should be updated or if anything is missing from the report. After the breakout rooms, members made the following comments:

* Both groups noted some edits needed in report and framing changes.
* Members suggested changes to career pathways for benefit planners to be career advancement.
* Include perspective that benefits planning encompasses financial literacy.
* Acknowledge the changes from Social Security Administration on overpayments and process changes.
* Changes needed in health care section for better readability.
* Edits to adjust wording in report.
* Add some detail on type of training that is being referred to in the report.
1. **Next Steps for Benefits Planning**

Executive Officer Aliferis-Gjerde discussed the next steps and how goal is to submit the report to CCEPD Full Committee for approval and submission to lead departments and Agency Secretaries. The executive Officer will reach out to members for additional feedback.

1. **Agenda Items for Future Meetings**

None noted.

1. **Public Comment**

No comments were made.

1. **Adjournment**

Meeting was adjourned at 3:50 p.m.