MIG-RATS
Benefits Planning Fidelity Workgroup
Thursday, April 26, 2007
Discussion Leader – Anne Reither

The goal of this workgroup is to develop measures of fidelity for benefits planning (BP). This group will run parallel to the BP Outcomes Workgroup, and the two groups will come back together in mid-summer to compare findings. Today's meeting summarized key points from an article on fidelity measurements, and provided a forum for sharing research questions.

Related Article: Mowbray, Holter, Teague and Bybee. "Fidelity Criteria: Development, Measurement, and Validation." *American Journal of Evaluation* 2003; 24; 315.

What is Fidelity Measurement?

- fidelity measurement is determining the extent to which the delivery of an intervention (BP services) adheres to the program model originally developed
- it can assure policymakers that the intervention is reaching its target audience and is being consistently implemented
- it can also improve outcomes by ensuring that a program intervention is implemented correctly and consistently across sites.

Steps for Developing Fidelity Measures

Step 1: Identify possible criteria for fidelity measures.

- Structure of BP delivery (e.g., staffing FTEs, staff to beneficiary ratios, education level, training/certification, location where service is provided, agency)
- Process of BP services (e.g., intensity and frequency of service, oral vs. written communication, understanding employment supports, content of advice given).
- Any potential measures need to be assessed for their validity, importance, data, rating, and burden of data collection.

Step 2: Collect Data to Build Scale (2 ways)

- Advice from experts/trainers. Experts are good resources but hard to reserve enough time, but they tend to be less knowledgeable about fieldwork than theory.
- Information from benefits counselors themselves. Benefit counselors are intimate with fieldwork but may misrepresent their work, rating themselves too high or low.

Step 3: Test for Reliability and Validity

- The scale built to assess the fidelity measures must be assessed for its consistency across
    - locations
    - administrators
    - time

Resources and Information

Using the WIPA RFP as a model would allow for consistency across states to some extent, but states were given a great deal of flexibility within WIPA grants. Therefore any BP fidelity measures will not be exclusively based on WIPA, but will have important elements of WIPAs, BPAOs, and other BP organizations (Amy - CT, Alexis - MA, Damon - OR).

Several resources might prove useful as we begin thinking about how to proceed:

- John Louie at the University of Wisconsin performed an expert review of benefits planning, which may reveal some core components.

- Tom Golden, director at Cornell, has published information and developed training curricula around benefits planning; they may also have information available on their website (www.workincentives.org).

- The Bridge to Employment full-security grant report will provide the methodology used and measures developed in Iowa, including a job description of a benefits counselor, core standards and skills (Karen, Iowa).

- The Wisconsin SPI Project: Anne and Barry developed BP fidelity measures for the employment-oriented BP and vocational training program that began at a single site and was expanded to 20 others. The end product was a six-item scale covering general areas, but a sophisticated fidelity tool was begun and abandoned as impractical and labor-intensive. Anne will see if any of the early development pieces have been preserved.

- WIPA RFPs.

- One useful exercise might be to compare BP definitions at the WIPAs, BPAOs, VRs, and SSA offices.

    - What are the minimum standards for becoming a counselor at each? Are they certified by SSA? What information is given out at each site and how accurate is it? How comprehensive are the services provided? Is the BP more conservative (oriented toward helping people work without jeopardizing benefits), or more aggressive (helping people work as much as physically/mentally possible)?

How can states use fidelity measures?

- To assess outcomes, i.e. the link between BP and employment and health (Karen).
- To measure ‘success’ of programs: type/extent of BP provided (Alexis).
- To understand whether BP is primarily work-incentive, work-promotion related vs. aimed toward getting people onto benefits (Damon).
- To determine changes in beneficiary attitudes before and after BP services.

Research Questions from States

- What is the focus of benefits planning: work incentives or getting/staying on benefits?
- What is quality service? Who provides it? What are the core skills of benefits planners?
- Where does benefits planning occur (WIPA vs. VR etc.)? Does location matter?
- Does delivery method matter? How does the language/vernacular of the counselor affect beneficiary understanding?
- How is benefits planning integrated into other employment support services? How does the integration affect quality/delivery/receipt etc.?
- Do the fidelity measures guide the outcome measures?

Homework for Next Meeting (June 6th):

- Everyone will think about
  - Potential tools or measures that would be useful, comprehensive and feasible;
  - Sources of information,
  - Goals,
  - Starting places,
  - Key domains or elements.

- Amy and Anne will collect useful background information (SPI project, Iowa project, Cornell's reports, and the WIPA RFP). At the next meeting we will discuss how to build on these and move forward.

- We will meet every 4-6 weeks on Wednesday afternoons. The next workgroup conference call is scheduled for June 6th.