

BENEFITS COUNSELING: FIDELITY MEASURES CONFERENCE CALL

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Discussion Leader – Alexis Henry

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MIG-RATS/MPR Staff: Amy Porter, Anne Reither, Gilbert Gimm, Krista Harrison

This is the third MIG-RATS workgroup conference call on benefits counseling (BC) with a focus on fidelity measures research. Today's meeting included a discussion of the results of a survey of state MIG representatives, discussion of potential domains for a survey of benefits counselors throughout states, and a request for development of potential survey questions within the domains for the next call.

Key Survey Results

- 14 of 22 states thought it very or somewhat likely they would do fidelity-related research within the next two years, indicating strong support for our efforts
- Few states have centralized databases of information on benefits planning or work incentives, and responses to data accessibility indicated great inconsistency.
- States did not have much data on benefits counseling services, so any fidelity measure would need to rely on primary data collection
- Most states thought they could successfully survey benefits counselors; a survey of benefits counseling consumers also appeared to be an option for most states.
- A 15-item (10-20 range) survey was anticipated to be an acceptable burden level for a survey of benefits counselors

Conclusions

A short survey (10-15 items, or lasting no longer than 30 minutes) will be developed. The intended survey respondents will be benefits counselors (people who provide benefits services). If there are states that wish to develop a survey of benefits counseling service consumers, MIG-RATS can work with these states as a secondary task.

Goal of survey

- To create an adaptable tool that will be useful across states, and across types of employment support service organizations (for example, WIPA vs. VR vs. other)
- To describe benefits planning or work incentives service delivery as a first step toward developing fidelity measures

Primary domains of survey – as identified by state survey responses

- Training: both initial and ongoing, sources, etc.
- Caseload: size, population served, etc.

- Context: Type of employment support service organization (WIPA vs. VR vs. other), location of organization, funding source, etc.
- Services: activities performed at intake or initial assessment, while planning and during follow-up; analysis of the depth vs. breadth, general vs. individual, level of assessment provided; duration and frequency of services
- Communications: types of information provided to clients
- Outreach – advertisement and recruitment methods

Other conclusions

- Use WIPA training materials as a starting place for developing training item content
- Ultimate survey length should be either be a maximum of 30 minutes or 15 items, whichever is shorter.
- Survey should probably ultimately be administered by email or online
- Survey could be tested as interview or as online questionnaire within a small group to solicit feedback and ensure questions elicit the desired type and level of answers
- Survey questions should not be totally open-ended, to reduce burden on benefits planners. Closed-ended items with behaviorally-anchored response options provide the most information.
- Survey should be disseminated from a central location or organization
- Introduction to survey must be worded carefully to accurately describe and delineate our goals and authority

Next Steps

- Anne will e-mail everyone to confirm that no survey domains have been forgotten or excluded, and to solicit any additional ideas
- Volunteers will work with Anne and Amy to develop questions within specific domains for potential inclusion in the benefits counselor survey as follows:
 - Joe Longcor (MI): Training, Outreach (potential recruitment of AWICs for help)
 - Alexis Henry (MA): Caseload/Context
 - Melissa Turner (MCHSD): Service, Communications. Will recruit TA center benefits planning trainers to help develop questions.
 - Anne Reither (MIGRATS): Communications
- NEXT CALL: Early or mid-September. Anne will email the group for preferences.