

Benefits Counseling: Outcomes Conference Call

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This is the second MIG-RATS workgroup conference call on benefits counseling (BC) with a focus on outcomes research. A separate call on 4/26 will focus on fidelity measures of BC. We expect some overlap between the workgroup discussions. This meeting provides a forum for states to develop key research questions on BC and to discuss next steps.

Background

- Typical Funding Sources: Benefits counseling (also known as work incentives planning and assistance) is typically funded by one of four sources.
 - Each state receives a minimum of \$100,000 from the Social Security Administration under the Work Incentives Planning and Assistance (WIPA) grants (previously the Benefits Planning, Assistance and Outreach [BPAO] grants).
 - MIGs can use up to 10% of their grant award for the direct service of benefits counseling.
 - Some states have a fee-for-service mechanism to fund benefits counseling.
 - Some state VR agencies provide financial support for benefits counseling.
- SSA has not yet developed a national evaluation of BPAO/WIPA programs.
- Since the conversion from BPAO to WIPAs, the requirement for case-management style service has increased, requiring the community work incentives coordinators to provide more consistent benefits management and follow-along services.

Measures

- Intermediate outcomes (e.g., use of employment support services)
- Long-term outcomes (e.g. earnings, hours worked)
- Effect of individual differences (e.g., age, timing of benefits planning)
- Effect of service-related differences (e.g., interaction with other support programs)

Key Research Questions from States

1. Does BC have any effect on earnings and employment?
2. Does BC *plus* supportive employment services have a greater impact on earnings than supportive employment services alone?
3. For whom does BC work? Does it depend on age, disability type, or motivation level? Who uses benefit planning (with specific interest in younger populations)?
4. Does BC have an effect on other long-term outcomes? (e.g., SSDI/SSI benefits, food stamps, family earnings, and self-employment)?
5. How does BC help on the continuum of employment supports, and other intermediate outcomes related to work incentives (e.g., PASS, IRWE subsidy)?
6. Where is the best place to access BC services (e.g., at a VR), and does it make a difference?
7. How well does BC promote self-sufficiency (readiness to work), knowledge about benefits, job seeking behavior, desire or motivation to work, etc?
8. When is benefit counseling most effective in the process of SSDI/SSI qualifications?

Additional Research Issues:

- What is the sustainability of benefits counseling? Will SSA continue to fund WIPAs and similar programs, justifying investment in infrastructure? Will they fund research about benefits planning directly? (Marsha Ellison)
- Which employment support programs help most, and are therefore worth distributing limited funds to – both from the view of the individual and from the state/local government?
- What is the definition of benefits counseling?

Data Source and Access

- MPR currently has a data sharing agreement to access the SSA Ticket Research File and Master Earnings File (i.e. integrated dataset).
- MIGRATS is currently developing a process for individual states to request state-level data analysis from the integrated datasets. Earnings data are annualized and there can be substantial time lags in data availability. Researchers are not able to see individual-level data, but submit programs to request aggregated data tables.
- BPAO and WIPA data are not publicly available, nor is there currently a national evaluator who might have access.
- The Longitudinal Employer-Household Dynamics (LEHD) database is a place where UI earnings data are available.
 - LEHD, within the U.S. Census Bureau, combines federal and state administrative data on employers and employees with information from core Census Bureau datasets.
 - It currently aggregates data from 43 voluntarily participating states. Not included are Alaska, Connecticut, Massachusetts, Nebraska, New Hampshire, New York, Ohio, South Dakota, Puerto Rico, and the Virgin Islands.

- Plans have been made to expand data collection to all states. State administrative data are pulled from the state UI system. (<http://lehd.dsd.census.gov/led/>). SSA is negotiating with Census to allow demonstration projects or joint SSA projects to link with LEHD data.

Next Steps

- The next workgroup discussion will be held in May, probably on a Wednesday afternoon.
- Anyone interested in participating/chairing workgroup should email Amy or Anne.
- States should vote for the top 2-3 research questions as priorities to address.