

BENEFITS COUNSELING: SERVICE DELIVERY MEASUREMENT

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Discussion Leader – Alexis Henry

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This is the fifth MIG-RATS workgroup conference call on benefits counseling (BC) focusing on service delivery (formerly fidelity) measures research. Today's meeting included a discussion of six potential domains for a survey of benefits counselors from each of the states, specific survey questions and issues within each domain, and development of potential survey questions for the next call.

Background

In July, the workgroup decided to design a short survey (10-15 items, or lasting no longer than 30 minutes) targeting benefits counselors (people who provide benefits education). This survey will be an adaptable tool that will be useful across states, and across various employment support service organizations (i.e., WIPA vs. VR vs. other). The purpose will be to identify aspects of benefits planning or work incentives service delivery, and similarities and differences between services offered by different providers, as a first step toward developing fidelity measures. During the NCHSD conference and a follow-up workgroup call, participants developed the content for six domains of survey questions: caseload, context, training, communication, services, and outreach.

Discussion Conclusions

The following comments and suggestions were based on the current version of the domain content list that was shared in advance of the call:

Caseload

- The concept of “caseload” can be confusing; instead, ask how many people are served in a specific time period, e.g. the past two weeks or one month.
- If the Ticket to Work question is included, it should include a “Don’t Know” option because of the idiosyncrasies of this work incentive.
- All questions should attempt to capture raw numbers in a specific time period, so as to optimize the probability of collecting accurate data.
- Include a question about unmet need/waiting lists, and whether these potential clients ultimately receive benefits planning.

Training

- Define “formal” training.

- There are university-based training programs, in Alaska for example. There are also training programs at Virginia Commonwealth, and Cornell Universities.

Communication

- Add questions about data collection tools/methods and follow-up communication methods.

Services

- Add questions to capture the length of time spent each session that benefits planning is provided, average total time spent with each client (either in a single or multiple sessions).
- Distinguish between active planning and follow-up services in the questions.
- Add questions to capture what other types of services the benefits planner provides, and what type of agency they are part of.

Other, general suggestions

- All questions should state their applicability to benefits planning activities only.
- Questions should be added to capture what the barriers to providing services are within each of the six domains.
- Offer as many fixed choices in a comprehensive list as possible because open-ended questions are problematic for data collection and comparison.

Next Steps

- Anne and Alexis will draft questions for all domains of survey, creating a bank of survey questions that will be paired down for the survey.
- They will work with small groups of volunteers to refine and eliminate questions.
 - *Caseload:* Dara (AZ), Lisa (ND)
 - *Context:* Karen (AK)
 - *Training:* Karen (AK)
 - *Communication:* Susan (MA)
 - *Services:* Ellie (WI)
 - *Outreach:* Dara (AZ)
- A full set of revised questions will be distributed to the group prior to the next call.
- The next workgroup meeting will occur in January. Anne will email possible times after the draft survey questions have been developed.
- Eventually, the survey will be piloted with a few WIPAs, including those along in MA. Cognitive testing will be employed to see whether people are answering questions the way we were hoping.