

Benefits Counseling: Fidelity Measures Workgroup Call

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Participants: Alexis Henry (MA), Denise Bolduc (NH), Shelia (NH), Nellie (NH), Joanne Malloy (NH), Lisa Johnson (SD), Paula Olgart (ND), Damon Terzaghi (OR), Molly Sullivan (OR), Felicia Halpert (NM), Carrie Wylie (NM); Pat Curtis (IL), Anita Boucher (MI), Barb Smith (MI), Kerry Linda (CWD)

MIGRATS/MPR Staff: Anne Reither, Amy Porter, Gilbert Gimm, Krista Harrison

This is the second MIG-RATS workgroup call on benefits counseling fidelity measures. Alexis Henry was introduced as the new chair of this workgroup. Today's meeting (1) provided a forum for sharing research findings of similar projects that used fidelity measures or defined the role and training of benefits counselors, and (2) initiated the development of potential domains for fidelity measures.

Background Information/Similar Projects

- Academic Reports and Publications
 - Cornell University training materials for the Technical Assistance for BPAOs and training of Benefits Specialists in that program (Joanne Malloy, NH).
 - Report on criteria used to hire Benefits Specialists under BPAO system (Tom Golden's Cornell Report) Different categories under WIPA. Use those since SSA already sanctioned them.
 - Dissertation on Benefits Planning
 - John Lui dissertation rubric for what benefits planning is. As yet untested, developed instrument through expert panel. Working on pulling out most relevant sections from the dissertation (Anne & Amy).
- State Examples
 - The Iowa Keys Project: looking at qualities while hiring benefits specialists rather than the information delivered.
 - Wisconsin SPI project: short measure used to assess quality of service used.
 - Massachusetts is developing fidelity measures for all locations work incentives/supportive employment are offered.

Potential Domains

Fidelity measures define what an ideal service or measure would look like, help to standardize services, and allows a measurement of the way in which the person or program of interest may deviate from the ideal service.

- Definitions of benefits planning vs. benefits counseling vs. benefits outreach
 - Involves a work component
 - Intended to help people make an informed decision; not outcomes-focused
- Data Issues
 - Benefits Specialist should be inputting the data
 - Data should be fed back to Specialist after analysis so that results can be incorporated into practice
 - Measurements of the effect of benefits counseling on work
- Best Practice checklist for Specialists to use
 - Key Features/Services Provided
 - Program characteristics (structure/organization)
 - Training and re-certification of Benefits Specialists (in a variety of types of service delivery venues)
 - Service Delivery Activities
 - Indirect Coordination Activities
 - Follow-up services (and their expense)

Potential Problems or Questions

- Should fidelity measures be focused on the following?
 - Individual level data on fidelity of service providers or
 - Aggregate measures to evaluate each work promotion program.
 - Amy: training materials might provide content. However, depends on level of benefits services we are interested in. Modular format? Scope of measure will be important to define, where data will be collected from
- Funding longevity affects ability to do follow-up benefits counseling. Prohibitively expensive to follow-up with people (see WI SPI project)

Next Steps

- MIGRATS:
 - Develop comparison of BPAO and WIPA benefits specialists job descriptions
 - Develop short questionnaire regarding fidelity measure domains, problems we might encounter.
 - Gather information on benefits specialists job descriptions, background, and where training information comes from.
- STATES:
 - Answer questionnaire and return before next meeting
 - Contact Anne if you are not currently receiving MIG-RATS e-mails and would like to
- NEXT MEETING
 - Six weeks from now: **Wednesday July 25th at 2:30-4 p.m. EST.**