

New Tools for San Diego Trainings, November 29th, 2006: Evaluation Report

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Introduction

After The California Health Incentives Improvement Project (CHIIP), in collaboration with representatives from several organizations, conducted three successful beneficiary-focused half day trainings that introduced and demonstrated Disability Benefits 101 Benefits to Work Calculator in June, 2006, they decided to offer several half day and full day training sessions across California. The training sessions were specifically designed to further introduce this new tool and to train service providers in using this tool with their clients. Key partners include:

- California Foundation for Independent Living Centers, Sacramento
- Independent Living Centers in Marin, Contra Costa, San Francisco, Los Angeles and Alameda Counties
- The Governor's Committee on Employment of People with Disabilities, Sacramento
- California Health Incentives Improvement Project, Sacramento office
- Hawkins Legal Center of the East Bay
- Social Security Administration Region IX
- California Department of Rehabilitation
- Employment Networks of the Ticket to

Work Program

- Goodwill Industries
- LA's HOPE Project (providing housing and employment services to homeless persons with a mental health condition)

The East Bay New Tools for Success training session was based on a half-day training session, now a documented, successful model with multiple speakers (see prior submitted training evaluation reports on the New Tools for Work training sessions, June, 2006).

The first training session took place on October 25th, 2006, at the Cerebral Palsy Center, in Oakland, California. The second training session took place on November 8th, 2006, at the Regional Center East Bay Concord Offices. The trainings were conducted by Bryon MacDonald, Program, Policy and Development Manager for the California Work Incentives Initiative (CWII) at the World Institute on Disability.

From 8:30-9:00 AM, participants registered, enjoyed a continental breakfast, and were in-

vited to collect free written materials at the registration and resource tables. These sessions emphasized benefits counseling with a special emphasis on the benefits calculator tool and the DB101 website (www.db101.org) as benefits counseling resources. The training sessions started with a brief introduction, followed

by a demonstration of the benefits calculator. After a short break, an interactive session took place during which the calculator was demonstrated by utilizing peoples' specific cases. Key community based benefits planners and Social Security Administration staff were available to offer their expertise as discussions developed.

Evaluation Results

Participants

The total number of attendees for the October 25th and November 8th sessions was 93. Of the 93 participants, 70 filled out the evaluation form (an excellent response rate of 75%).

How Participants Heard About the Meeting

The majority of participants heard about the meeting at work (43%).

- Colleague connected with work (43%)
- Email (37%)
- Non-profit organization (10%)
 - ◆ Coastal Career Center
 - ◆ Career Center
 - ◆ Regional Center
- Advertisement or flyer (3%)
- Some other way (7%)
 - ◆ Community Research Foundation
 - ◆ Deaf Community Services
 - ◆ Employer

Participants' Affiliation

Of all of the affiliations listed (some participants indicated more than one affiliation), thirty-two percent indicated that they were representing a community non-profit organization:

- Community non-profit organization (32%)
 - ◆ Employee, case manager or benefits planner at RCEB

- Government vocational or social service program staff (27%)
- Educator (24%)
- Other (15%)
 - ◆ Job developer; partnerships with industry
 - ◆ Deaf Community Services
 - ◆ Department of Rehabilitation
 - ◆ Transitional housing for people with HIV/AIDS
 - ◆ San Diego Job Corps
 - ◆ EDD Job Service
- Individual with a disability using benefit programs and not currently working (2%)

Comments and Suggestions

Six open-ended questions gave participants an opportunity to give more in-depth information about their experiences at the New Tools for Success training session, along with their opinions and suggestions for future meetings. The following bulleted lists summarize the percentage of comments offered in particular categories, and provide a few representative examples of some of the comments made.

What goals did participants bring

to the training session?

The majority of comments participants offered about the goals they brought with them to the training session were in reference to generally a better understanding of disability benefits, counseling tools and available networks (47% of all comments).

- A better understanding of disability programs (47%)
 - ◆ Closer understanding
 - ◆ Better understand benefits
 - ◆ Better understanding of SSI and SSDI
 - ◆ Better understand benefits and networking
 - ◆ Understand how benefits change for the disabled person going back to work
 - ◆ Understand how wages affect social security
 - ◆ Wanted to be updated on programs
 - ◆ To learn something I didn't already know
- Better ability to assist clients (22%)
 - ◆ Understanding and confidence with the information I share
 - ◆ Show and teach my clients about this
 - ◆ To be able to assist clients with current and accurate information
 - ◆ To give more educated guidance to clients concerning SSDI/SSI
- Become more familiar with the Benefits Calculator and/or the DB101 website (31%)
 - ◆ Understand in depth the DB101 Calculator
 - ◆ Understand how to use the new site
 - ◆ Understand the Calculator to improve services to clients
 - ◆ Learn how to use the Calculator
 - ◆ Navigating the Calculator

Were their goals met during the training session?

Participants were asked whether or not their goals were met during the training session and to describe further why or why not. Most participants (95%) indicated that their goals were met and had comments and insights to offer as to why they thought the training was successful. Three percent did not indicate whether their goals were met, and two percent answered no one said that their goals were not at all met.

- Yes, goals were met; comments on the plethora of information that was clearly presented (52%)
 - ◆ Clear and reviewable information
 - ◆ Great presenter— informative and examples were good
 - ◆ Excellent info on how social security works
 - ◆ Great information
 - ◆ Information was concise and to the point
 - ◆ Learned overall benefits and new rules
 - ◆ Step by step simple scenarios
 - ◆ Plain English explanations, very relevant
- Yes, goals were met; comments on the calculator and other tools, plus the materials and access to the DB101 website (38%)
 - ◆ I learned how to use the site and how to assist clients
 - ◆ I got comparisons depending on each clients eligibility... what a surprise!
 - ◆ The Calculator is a great tool for as-

sisting customers

- ◆ The resources and examples were great
- Training exceeded participants' expectations (8%)
 - ◆ [Training met goals] And then some! Very interesting information on Medi-Cal. The web site will be very helpful
 - ◆ This more than met my goals. [The calculator is] an incredible tool
- Participant goals were not yet met (2%)
 - ◆ Not yet. It is very complicated

After the training, are participants more hopeful that people with disabilities can work and retain benefits?

- Yes, all of the information, along with the resources, are empowering (38%)
 - ◆ Yes, having the Calculator will help me feel better empowered to assist customers and get the word out
 - ◆ Absolutely! I'm amazed at what is available to them
 - ◆ I think knowledge will help greatly
 - ◆ It doesn't change my belief that people can work and maintain benefits, but it does give me the tools so they can make the best decision while to return to work
 - ◆ People do have an informed choice if going to work is the best option
- No, somewhat, or not sure (23%)
 - ◆ I think it will be reassuring for consumers to actually see what will hap-

pen. Not sure if it will encourage them to work or not

- ◆ It looks like it's not a good idea for people with disabilities to get jobs if it loses them money, if job is at minimum wage
- ◆ No. due to graph shown that each example went into decline after one year of employment with benefits
- ◆ Slightly— programs are extremely complicated and I still need more clarification
- ◆ Somewhat— in many cases yes, but as demonstrated by the calculator, not everyone
- ◆ In most cases, but the scenarios with the homeless shelter woman proved otherwise
- Yes, but wish to bring hope to clients (18%)
 - ◆ I already was [hopeful], but with these tools, I can help my clients feel more hopeful
 - ◆ I've always felt people with disabilities can work, but this training will help advise clients of their options
 - ◆ Yes, people with disabilities can feel more hopeful, as long as they understand their financial situation and the benefits they can secure while working
- Qualified yes (9%)
 - ◆ Yes and no, depending on the out-

come and how great the social security is

- ◆ Yes, although each situation is unique and should be explored
- ◆ Yes, but cautions were outlined regarding incentives over time
- Yes, the calculator and DB101 website are very useful tools (6%)
 - ◆ Benefits Calculator will be very useful to me and my staff
 - ◆ I feel that I can help them better calculate their benefits and what would work best for them
 - ◆ Yes, having the Calculator will help [consumers] really see how employment will affect their benefits
- Even more so now: Previously participants had some knowledge, but the more detailed information along with the resources are very important and helpful (6%)

What Participants Found Most Useful

- Calculator and/DB101 website (53%)
- Specific resources provided at the training session (13%)
- All of the information (13%)
- Specific topic or tool (12%)
 - ◆ SSDI work rules graph
 - ◆ Examples
 - ◆ Understanding trial work periods
- All of it (9%)

More comments on the calculator

Participants were asked if the calculator would be helpful to them or someone they know, and to comment further on the calculator. Ninety-five percent of those who responded indicated that the calculator would indeed prove useful to them or someone they know. Only one person (2%) indicated that it would not be useful to them or someone they know, while one person (2%) declined to answer. The following are comments given by participants in regards to the calculator:

- Good information and useful tool that can be utilized with clients or significant others (43%)
 - ◆ Help assist perspective job seekers in selecting the most appropriate of situations
 - ◆ Help planning
 - ◆ Helping individuals make better choices
 - ◆ I can explain SSI to students and families prior to work
 - ◆ I can figure out if it's beneficial to a client to accept a specific job or not
 - ◆ It will help counselors and clients in vocational planning and informed choice
 - ◆ It's going to be very helpful in assisting my consumers receiving benefits and working
- Comments regarding to whom the calculator will prove useful (26%)
 - ◆ It takes the counselor's understanding of the benefits out of the equation

- ◆ I job develop for individuals with disabilities and other barriers
- ◆ Only for [consumers] who are concerned about their future finances
- ◆ My clients and friends
- Clients can see for themselves how working will affect their benefits (23%)
 - ◆ To show individuals how employment affects their benefits
 - ◆ Useful for consumers who want to work but are fearful of how it might affect their benefits
 - ◆ It's more than a visual aid, it makes the impact on benefits clear to customers
 - ◆ I run into many people who think any kind of paid employment will make them lose their benefits
 - ◆ More will be able to see how their benefits are affected
- Can't wait to use it and would like to train others (8%)
 - ◆ I will instruct my staff on how to use it
 - ◆ I've been directing clients tot his site the last couple of months
- Unsure if this will be useful in the future (2%)
 - ◆ Only if they are concerned with their future finances
- ◆ Just do the training enough so that it clicks
- ◆ Many more, on a regular basis
- ◆ More training. Fantastic!
- More outreach (23%)
- More detail and/or more examples (19%)
 - ◆ Perhaps extend an hour and go more into detail
- All of the training was great; no suggestions (15%)
- Organizational suggestions (12%)
 - ◆ Expand to all day; open agenda to for networking and discussion
 - ◆ More people [trainers?] and limit number of people in training

Participants' Overall Ratings of the New Tools for Success Training

Participants were asked to rate the extent to which they agreed or disagreed with statements regarding the New Tools for Work Training, on a scale ranging from one to five. One indicated that they strongly disagreed, and five indicated that they strongly agreed, with five questions designed to assess their overall satisfaction with the New Tools for Success training session. Overall, participants gave high ratings on all five questions, and the average ratings across participants were above the neutral point (three) on every question (see table on page six). In other words, overall, participants agreed that they felt more confident that they or their loved ones or clients would be able to work and continue to receive benefits, that there are support networks in place for them, along with tools, resources and staff that they can access at any time, that they know where they can go to get help should they need it, and that being able to work and receive benefits will enhance the lives of disabled individuals.

Recommendations

- More of the same (31%)

Question:	Average	Standard Deviation from average
I feel more confident that I (or my loved one or client) would be able to work and still retain needed benefits:	4.07	.72
There are support networks in place that can help me (or my loved one or client) work receive benefits:	4.19	.82
There are tools, resources and staff available that I (or my loved one or client) can access which will help me in the future:	4.34	.73
I (or my loved one or client) know where to go and who to contact if help is needed in the future:	4.08	.79
Being able to work and receive benefits will enhance the quality of my (or my loved one or client's) life:	4.46	.73

Summary

These evaluation results indicate that after the training session, participants felt confident that they or their loved ones or clients would be able to work and continue to receive benefits, and that there are support networks in place for them, along with tools, resources and staff that they can access at any time. They also indicated that they know where they can go to get help should they need it, and that being able to work and receive benefits will enhance the lives of disabled individuals.

Training participants indicated that they had specific goals in mind at that these goals were largely met. The training provided them with a better understanding of how disability benefits are impacted by work, became more familiar with the website and Benefits to Work Calculator, enjoyed clearly presented and concise information, and felt more prepared to assist disabled clients who wish to work without losing their benefits.

It's clear that the DB101 website and Calculator are perceived as very useful tools that will assist them in the future. Participants offered very few suggestions for improvement in the future, except that facilitators should keep the trainings coming. These results also show that training facilitators were successful at demonstrating that it is important to evaluate each disabled person's case on an individual basis to determine if going back to work is the best and most educated choice for that specific individual. The qualified yeses in answer to the question of whether participants felt

more hopeful that disabled individuals can work and still receive benefits are a reflection of this fact. Participants pointed out that in some cases, going back to work might not be the best option.

Most participants (53%) cited the Calculator and the DB101 website as the most useful element of the training session. When asked to comment further on the Calculator, they seemed to think the Calculator, along with the website, are very useful tools that will help consumers and advocates alike, and especially liked the fact that individuals with disabilities can use the Calculator tool themselves to evaluate their specific circumstance. Many thought that the Calculator will be useful specifically for those who are ambivalent about working with a disability because they are afraid of losing their benefits.

Most importantly, when asked to comment on whether or not they are more hopeful that disabled individuals can work and still receive benefits, all commented that they are even more so after the training, or at least somewhat more hopeful. Many agreed that the new tools are empowering to clients and consumers. They think the new tool will help them and their clients to evaluate whether or not going back to work is the optimal choice for that client. They seemed to generally feel more optimistic about back to work programs after having participated in the New Tools for Success trainings session, but were also cautious about concluding that going back to work is the best choice for all disabled individuals receiving benefits.

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Please direct any comments, questions or suggestions regarding this report to:

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