Section Seven

Outreach

Objectives
1. Understand importance and utility of a network.
2. Identify critical stakeholders.
3. Practice network-building strategies.
Essential to any customer-service based industry is the network upon which services and supports are built upon and targeted. Some of the fastest growing and most successful companies in the United States are those which are based on personal network marketing approaches—companies that utilize personal marketing agents to tap into their network of friends, colleagues and associates.

According to the American Heritage Dictionary of the English Language (Morris, 1969), a network can be defined several ways:

• *An openwork fabric or other structure in which rope, thread, wires, or other materials cross at regular intervals;*
• *Anything resembling a net in concept or form, as by being dispersed in intersecting lines of communication;*
• *A chain of interconnected radio or television broadcasting stations;*  
  and/or
• *A group or system of electric components and connecting circuitry designed to function in a specific manner.*

For the purpose of benefits planning and assistance, we take important elements from each to define a network as…

> “a dispersed tapestry of stakeholders crossing at regular intervals to share information and resources weaving a chain of interconnected activities, services and supports.”

Networking is an important skill and feature of benefits planning and assistance as it provides the context within which the practitioner will work. Many new benefits specialists may be entering the field with a small to nonexistent network. The remainder of this unit will focus on strategies and activities to enhance network building and outreach.

Critical to the benefits specialist’s network are several important stakeholders, including: individuals with disabilities, their families, their service providers, their advocates, their planners, their supporters, and SSA.

**Beneficiaries and Recipients with Disabilities**

The core of a benefits specialist’s network is the beneficiaries and recipients who require benefits planning and assistance services and supports. Rapport and trust are the important elements of relationship building with this group. Past successes will further expand this network. Negative or unsuccessful experiences may pose an obstacle as to how others will perceive the services and supports provided.
Family Members

As with beneficiaries and recipients, family members are another prime stakeholder to invest in as part of the benefits specialist’s network. As important as the trust and rapport built, is the extent to which the practitioner “listens” to needs, concerns and fears expressed by family members. In some cases, benefits received by the individual may in part support the financial well-being of the person’s immediate family. Investment and information sharing with this group is essential and may play another large role in expanding the practitioner’s network.

Advocates

Advocates are broadly defined to include: peer counselors, independent living personnel, legal representation, due process representatives, and others charged with defending, supporting or advocating on behalf of the beneficiary or recipient. The savvy benefits specialist will understand the significance this group has as part of an effective network. While most would agree the beneficiary or recipient is the benefits specialist’s primary customer, they do have secondary customers, which may include funders of their services. Here we begin to outline a struggle that may potentially exist as benefits specialists define their role in providing advocacy-related support. It is important to be aware of the impact advocacy may have on secondary customers, especially when providing counsel to individuals on actions they may need to take. An effective network would include linkages and relationships with and advocates within the geographic area being targeted, affording the benefits specialist a greater opportunity to refer the beneficiary and/or recipient in cases where potential conflict of interest may exist.

Service Providers

This is an important stakeholder group for benefits specialists, providing the services and supports that their customers may need but that they are not able, or equipped, to provide. This would include: employment networks, residential programs, providers of community rehabilitation services, state agencies, workforce investment councils, and other groups with specific areas of expertise. It is not expected that the benefits specialist be an expert in all areas, but that when the case arises, they have the ability to network their customers with those that do (e.g. rehabilitation counseling, vocational assessment, supported employment, community living, etc.). This group is also an important consumer of information and training that the practitioner may make available, as well as an important referral source.
Planners/Case Managers

Planners and case managers are another important stakeholder group to invest in the benefits planning and assistance process. Often, beneficiaries and recipients are already attached to another service delivery system. Whether it is state vocational rehabilitation, the mental retardation and developmental disability system, schools, or the mental health system, these individuals probably already actively participate in some sort of formal service delivery planning process which is outlined in a planning document. Planners and case managers, besides being another potential referral source, may also play a key role in establishing long-term benefits planning and assistance supports. As the designers of individualized service delivery plans, they have the ability to integrate goals and objectives concerning benefits management that may result in the individual’s long-term success.

Support Personnel

Support personnel are those individuals in the beneficiary/recipient’s lives who have specific roles and responsibilities in supporting the person on a regular basis. These people are important members of the practitioner’s network, as they are providers of reliable qualitative information about what is going on in the individual’s life, where support needs exist, and potential safety net strategies. This group would also benefit from information and resource sharing and serve as a potential referral source.

SSA

Last but not least, SSA is a vital partner. The effective benefits specialist will maintain close relations and connections to both their local, state, and regional SSA office. Locally, they can establish important relationships and reporting protocols with claims representatives and employment support representatives (ESR). At the state level, they can keep abreast of proposed changes coming down the road and maintain relationships with PASS Specialists and ESRs. At the regional level they can learn about of other effective practices and regional roll-out of special demonstrations and events.

Benefits planning and assistance is about establishing partnerships that enhance the self-sufficiency and economic wellness of beneficiaries and recipients while at the same time supporting their employment interests.
Stakeholder Analysis

Exercise

Working with a small group from your agency or by yourself, take fifteen minutes to begin conducting a Stakeholder Analysis. This is another important step in developing a broad marketing plan for benefits planning and assistance services and supports. This will help you identify your network and other stakeholders, who need to be brought into the fold.

The Stakeholder Analysis is provided in Appendix H. If you are part of a larger agency or school providing benefits planning and assistance, you may wish to use the tool to conduct Stakeholder Analysis.

There are several ways to expand personal and professional networks within your community and geographic area being served.

1. Research agencies and schools through advertising, trade journals and newspapers
2. Become familiar with the array of services, supports and products available within your community targeted to individuals with disabilities
3. Research local needs and trends
4. Find out who the decision-makers are in the specific stakeholder groups you are targeting
5. Participate in the broad array of functions and activities offered around the human services community
6. Join/participate in human services coalitions/consortia
7. Tap into existing networks you maintain to secure advice and recommendations for broadening the network
8. Talk to other divisions or agencies and schools you or your agency is familiar with
9. Seek referrals from everyone – let your community know what you are attempting to do and how you can help
10. Offer secondary services and products to members of your network
11. Develop and disseminate information including fact sheets, brochures and cover letters, using both direct mail and Internet applications, such as listservs, to get your message out into the community
12. Enhance education and human interest through face-to-face contact; participate in events such as college fairs and job fairs and provide community education programs/presentations
13. Secure references from existing members of your network and past satisfied customers
14. Provide media releases of successes and stories of human interest
Creating Mutual Gains

As network members are beginning to be recruited, it is important to answer some preliminary questions to begin establishing mutual gains. This is an approach that employs the identification of mutual interests to resolve differences and establish common ground and includes:

- Identifying what the end-result benefit is to both parties
- What potential problems our collaboration may be able to resolve
- Why someone would want this
- How this might help both parties or individuals being served gain recognition, self-esteem, or a better quality product
- How the other party or individuals being served might enjoy greater profit; and/or,
- How future crisis may be avoided.

Establishing Trust

Establishing trust and rapport with an individual or stakeholder group is a human variable that must be addressed. The effective practitioner can accomplish this in several ways. First, being available is an important and often underrated trait. In this age of e-mail, voice mail, and automated phone answering systems it can often be difficult to connect with another human being. Positioning yourself as accessible and available to your network will ultimately result in your being relied upon as a consistent mechanism for information and other services. In our age of quality management initiatives, it can’t be emphasized enough the role that “What I can do for you” versus “What can you do for me” can play in building trust and establishing rapport. When attempting to establish trust, the practitioner should never err on the side of over-promising what they can deliver. Establishing success stories up front and securing references and recommendation will go a long way in others building trust and confidence in your services and supports.

Building Collaboration

Building collaboration and making community connections is critical to expanding benefits planning and assistance networks. For the most part, connections with others will increase opportunities to: build on a community’s strengths; provide for the whole person; increase potential for survival and growth; and potentially improve cost-effectiveness.

Factors that impede connections:

- Fear of putting the people we serve at risk, possibly because we may need to give up some responsibility; we feel we know the person best; it won’t get done unless we do it ourselves
• Easier to just do it yourself
• No history or bad history of coordination
• Needs are immediate
• Little knowledge of available services, goals, operations
• Able to operate independently
• Turf issues and pride
• Always done it this way
• Don’t have the time

Factors that foster connections:

• Recognition and sensitivity to differences
• Understanding each person’s and agency’s goals, operations and services
• Complementary goals with similar values and philosophy
• Voluntarily entered relationships
• Support from management
• Scarce resources and fostered interdependency
• Mutual gains established
• Mutual planning
• Frequent opportunity for information exchange
• Capacity for data management and sharing of outcomes
• Well organized and intended connections
• Gradual implementation
• Ongoing evaluation of outcomes of connections

Maintaining an Effective Network

Like a garden, a network is only as effective as the amount of time put into nurturing it. To simply have a list of agencies and individuals on a piece of paper is not enough. The practitioner needs to intentionally foster planned intersections with their network, regular points in time when either information and resources are shared, updates are provided, or other activities are planned that are essential to the livelihood and wellness of the network. A log for recording stakeholder contacts is an important tool. It not only provides a record of who the benefits specialists have been in contact with but also the topic and potential outcomes. This information can be easily established in a database program and easily summarized, analyzed and/or reported. A sample log that has been databases is provided in Appendix I. This contact log will prove useful in several areas:

• Tracking outreach activities
• Tracking short-term advisement, technical assistance, or problem solving
• Tracking marketing activities
• Logging community training
• Documenting networking activities