

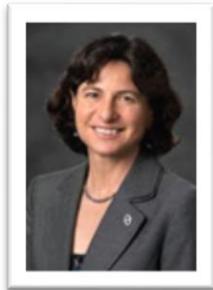
Center for Benefits Access Grantee Orientation Guide



January 2019



Welcome Message



We are delighted that you are joining us on our journey to help older adults and adults with disabilities connect with benefits that will improve their quality of life. Beginning in 2009, NCOA's Center for Benefits Access supported a handful of Benefit Enrollment Centers (BECs) to provide person-centered assistance to older adults to enroll in benefits. Today, we have a large network of BECs and SNAP grantees spanning 43 states. We are proud to partner with your organization to improve the lives of millions of older adults, especially those who are struggling to meet their basic living expenses.

The Center team at NCOA is excited to guide and support your organization along this journey, and we look forward to celebrating your success in improving the economic security of individuals in your communities.

Sincerely,

A handwritten signature in cursive script that reads "Leslie Fried". The ink is dark and the signature is written in a fluid, personal style.

Leslie Fried
Senior Director
Center for Benefits Access
National Council on Aging

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I. Overview of NCOA & the Center for Benefits Access

The National Council on Aging (NCOA) is a respected national leader and trusted partner to help people aged 60+ meet the challenges of aging. Our mission is to improve the lives of millions of older adults, especially those who are struggling. Through innovative community programs and services, online help, and advocacy, NCOA is partnering with nonprofit organizations, government, and business to improve the health and economic security of 10 million older adults by 2020.

NCOA's Center for Benefits Access helps community-based organizations find and enroll seniors and younger adults with disabilities with limited means into benefits programs for which they are eligible, so they can remain healthy, secure, and independent. The Center accomplishes its mission by developing and sharing tools, resources, best practices, and strategies for benefits outreach and enrollment.

The Center is supported with funding from the Medicare Improvements for Patients and Providers Act (MIPPA) through a cooperative agreement with the U.S. Department of Health and Human Services' Administration for Community Living (ACL). Since 2009, the Center for Benefits Access has served as the ACL MIPPA Resource Center.

The Center accomplishes its mission by:

- Providing tools and resources that help local, state, and regional organizations to find, counsel, and assist seniors and younger adults with disabilities to apply for and enroll in the benefits for which they may be eligible.
- Generating and disseminating new knowledge about best practices and cost-effective strategies for benefits outreach and enrollment.
- Supporting the establishment of Benefits Enrollment Centers providing person-centered enrollment throughout the country.

Additional funding for NCOA's benefits access work is provided by the Walmart Foundation, which supports efforts across America to increase outreach and application assistance for low-income seniors to enroll in the Supplemental Nutrition Assistance Program (SNAP).

II. About the BEC and SNAP Grantees

The purpose of the Benefits Enrollment Center (BEC) program is to develop and implement *coordinated, community-wide, person-centered and more seamless systems* for finding, enrolling, and retaining Medicare eligible seniors and/or adults with disabilities in all the public benefits for which they are eligible. The goal is to promote lasting transformation to the ways in which these individuals access benefits, to ensure their future financial security. There are many strategies that can be used to accomplish this goal, and BECs are encouraged to incorporate (and customize) those that will be most effective in their target area.

NCOA's Senior SNAP Enrollment Initiative is focused on increasing participation in SNAP. SNAP is our nation's most effective and widest-reaching anti-hunger program. The average senior SNAP benefit is \$103 a month, but only 42% of eligible seniors are participating, which means ~5.2 million eligible adults age 60+ are missing out on this program. Eligible seniors are not participating in the program because they face significant barriers to access: isolation, lack of transportation, stigma and fear of reprisal, a complex application process, and misinformation about the program. NCOA's initiative provides funding to community-based organizations across the country to provide direct application assistance, address barriers to participation, and increase access to SNAP.

There are a variety of organization types operating BEC and SNAP sites across the country. They include but are not limited to: non-profit organizations, public government agencies, universities, hospital/health clinics, Area Agencies on Aging (AAAs), Community Action Agencies, faith-based organizations, and food banks. There are grantees who function via a call center model or through a brick and mortar office/store front location. BEC and SNAP grantees may serve a single county/community, large portions of or an entire state, or multiple states. Each brings their own unique skills to this work and a wide array of community partners.

III. Core Benefits Programs for People with Medicare

NCOA's Center for Benefits Access has identified the following five programs as core benefits that can help low-income seniors and younger adults with disabilities to pay for health care, food, prescriptions, and utilities. Grantees are welcome to assist clients with a broad range of other public and private benefits; BEC grantees are required to screen and assist clients with these five.

Medicare Part D Extra Help/Low-Income Subsidy (Extra Help/LIS)

Beneficiaries with Medicare who have limited income and assets may qualify for Extra Help with the costs of their prescription drugs. The Social Security Administration (SSA) and the

Centers for Medicare & Medicaid Services (CMS) work together to provide this benefit. Some people get Extra Help/LIS automatically; this includes people who are enrolled in both Medicaid and Medicare, those receiving Supplemental Security Income (SSI), and those who qualify for a Medicare Savings Program. For individuals who do not qualify for SSI, Medicaid, or Medicare Savings Programs, they can apply for this benefit directly to the SSA either online or by paper application. People receiving Extra Help/LIS pay no premiums (up to a benchmark amount), no deductibles (unless receiving the partial subsidy) and lower copayments for their medications at the pharmacy.

Learn more at: <https://www.ssa.gov/benefits/medicare/prescriptionhelp/>

Medicare Savings Program (MSP)

Medicare Savings Programs (MSPs) are Medicaid-administered programs for people on Medicare who have limited income and resources. These programs help those qualified to afford Medicare. Seniors and younger adults with disabilities who may not qualify for full Medicaid may still be able to enroll in an MSP. There are four different types of MSPs, each with different income and resource eligibility limits:

- Qualified Medicare Beneficiary (QMB)
- Specified Low-Income Beneficiary (SLMB)
- Qualifying Individual (QI)
- Qualified Disabled Working Individual (QDWI)

Learn more at: <https://www.medicare.gov/your-medicare-costs/get-help-paying-costs/medicare-savings-programs>

Medicaid

Medicaid is a state-run health insurance program that pays for a broad range of medical services for people with low income and resources. Each state runs its own Medicaid program, so eligibility and additional program benefits may vary by state. Basic services include doctor visits, inpatient and outpatient hospital services, lab tests, x-rays, medical transportation, family planning services, nursing facility services, home health, and nurse practitioner services.

Learn more at: <https://www.medicaid.gov/>

Supplemental Nutrition Assistance Program (SNAP)

SNAP provides benefits to qualified households through electronic cards (like debit cards) that enable them to buy nutritious food at participating stores. Less than half of all seniors who qualify for SNAP are enrolled in the program, making low-income seniors especially vulnerable to hunger.

Learn more at: <https://www.fns.usda.gov/snap/supplemental-nutrition-assistance-program-snap>

Low-Income Home Energy Assistance Program (LIHEAP)

LIHEAP is a federally funded program that provides grants to states, territories, the District of Columbia, and tribes to assist qualified individuals with their home heating and cooling costs. In addition to assistance with energy bills, some funds are available to make improvements to homes and apartments to make them more energy efficient and reduce heating bills.

Learn more at: <https://www.acf.hhs.gov/ocs/programs/liheap>

IV. The Person-Centered Approach

The BEC program is committed to supporting a **person-centered**, holistic approach that considers the full needs of a person, not just the need for a particular benefit. This involves not only informing people about benefits and eligibility criteria, but also assisting them in navigating the application and recertification process.

A person-centered approach recognizes that one call or meeting with an individual may not be sufficient to meet all of his or her needs, and thus requires having systems in place to sustain contact with and continue assisting the same individual over a period of time. This type of comprehensive system is both more seamless for consumers, in that it reduces their burden and duplication of effort, and more efficient with regard to demands upon state and federal resources. Research has consistently demonstrated that community-based organizations, using a one-on-one person-centered approach, are the most effective at successfully identifying and assisting potentially eligible individuals for need-based programs.

Coordinated community approach

An integral part of this process is *community mapping* – determining the right partners who need to be engaged, defining the appropriate roles and commitment levels for each of the partners, and working together to determine which outreach and enrollment strategies will best fit the community being served. See Section IX of this guide for more information on partnership and outreach strategies.

Follow-up with individuals assisted

Conducting follow-up conversations and activities to ensure that applications are successfully completed and submitted, that any problems are resolved, and that benefits are being received is an important element of seamless community systems of benefits enrollment.

When problems are discovered through the follow-up process, the BEC is expected to reach out to the individual, the family, and/or the relevant agency determining eligibility to resolve delays, other issues in eligibility determination, and to understand and address any

inappropriate denials. The approach should generally ensure that individuals actually receive the benefits for which they are eligible.

Follow-up also allows for confirmation that the individuals are receiving the benefits for which they applied and to provide additional assistance and education, including ensuring that individuals retain these benefits through recertification as necessary.

BEC holistic approach do's and don'ts

The idea behind the BEC program is to help connect individuals with as many benefits as possible and in one point in time. Helping the individual avoid the need to visit multiple locations for assistance with benefits is at the center of the holistic approach. Below are a few examples of do's and don'ts of this approach.

Do: Whenever possible help a client with a screening and completion of more than one application in real time. To assure timeliness, provide clients with a checklist of required documents to apply for benefits.

Don't: Wait until the following reporting cycle to report on completed applications because the client did not have all the documents needed to apply, or they were not contacted for follow-up once it was determined that they needed to have another appointment to finish an application(s). This will negatively impact your benefit average for completed applications.

Do: Advertise requirements for completing individual benefits beforehand with outreach venues and community partners and utilize these connections to send the message to potential participants. This will inform participants of what they need to bring with them ahead of schedule.

Don't: Show up to an enrollment event without advertising the requirements for the programs you intend to help participants apply. Never assume your audience is aware, nor that the contact at the host site has prepared them in advance. For instance, this assumption is often made at senior centers and hospitals where Center Directors and Discharge Planners are assumed to be experts in senior services and consequently benefits.

Do: Develop a thorough follow-up process that encourages interactions with eligible individuals after the initial contact. Successful BECs utilize an integrated telephonic system and/or case management database. These methods reduce the lag between initial contact with a client and completing applications for benefits.

Don't: Simply hand out business cards and BEC flyers at screening and outreach events. Even eligible individuals will most often not call. If possible, avoid screening at outreach

events, yet don't wait long too long afterwards to follow up with individuals after these events. This almost always leads to the person changing their mind or forgetting they even met you at said event.

V. Technical Assistance (TA)

TA calls

As a requirement of your grant, all grantees are required to participate in technical assistance calls. The purpose of technical assistance calls is to hold periodic check-ins on your progress in the field, review your monthly metrics and progress to date, and develop solutions to resolve any current issues.

At the start of your grant period your assigned TA lead will contact you via email as a brief introduction and to gather information about your staff. Please monitor your inbox closely as your technical assistance lead will send frequent requests. For instance, you will be asked to provide the names, email addresses, and roles of your team members.

During the implementation period (first 3 months) you will not have any TA calls. This will allow you to focus on implementing your grant. The first TA call will be held during the fourth month of the grant. To be prepared, please have the following items ready prior to your scheduled call:

1. Project work plan
2. Any updates on partner strategies/updates
3. Any BEC/SNAP grant related issues you are troubleshooting
4. Impressions on how things are unfolding (what is working, what is not and what you hope to see happen soon).
5. Questions for NCOA TA lead

Types of TA calls

1. Bi-Monthly TA calls for new grantees
2. Monthly TA calls (for BEC and SNAP grantees with corrective action plans)
3. Quarterly regional network calls (large group calls 1- 1.5 hours in length)
4. Ad-hoc TA calls (at the request of the BEC and SNAP grantee)

Special note: In addition to the four types of calls listed above, an **introductory group call** will be hosted for NEW BECs and SNAP grantees with the existing grantees in your service area/state. The introductory group call will occur at the beginning of your grant cycle and serve as an introduction to other grantees in a service area where a new grantee is setting up shop. The idea is to forge a connection between all the grantees serving a state/region and develop a network of providers who can call on one another for support as needs arise.

For BECs and SNAP grantees who are in their second grant cycle or more, you will not have a standing schedule of TA calls with the Center staff. However, if issues arise, a call will be scheduled. The Center staff will review your monthly statistics and monitor your narrative submissions for significant content. Findings from these reports and narrative submissions may result in a follow-up call with NCOA staff.

What is discussed (please be prepared to discuss the following)

Not all items are addressed on every TA call nor in the order listed below. Items are discussed based on the needs and progress of the grantee.

1. Outreach
 - a. Discuss outreach strategy
 - b. Strategize next steps and creating new outreach (where, how frequent, who is involved and results)
2. Marketing/advertising of your program
 - a. Types of messaging used
 - b. How clients are reacting to messaging
 - c. Developing new messaging techniques
3. Staffing updates (paid staff, volunteers, and interns)
 - a. How staffing is affecting the progress of your program
4. Partnerships (current, new, or desired partnerships)
5. Issues with core benefits and matters related to the processing of applications
6. State and federal policy issues impacting your BEC/SNAP projects
7. Progress towards your goal (project deliverables)
8. Budgetary issues/concerns
9. Sharing of ideas to improve your approach(s) to strengthen your reach and impact

Bi-monthly BEC & SNAP grantee network calls/webinars

Purpose: To increase knowledge of BEC/SNAP grantees around issues related to benefits access, and to provide the platform for grantees to share their innovations and good work with the entire network.

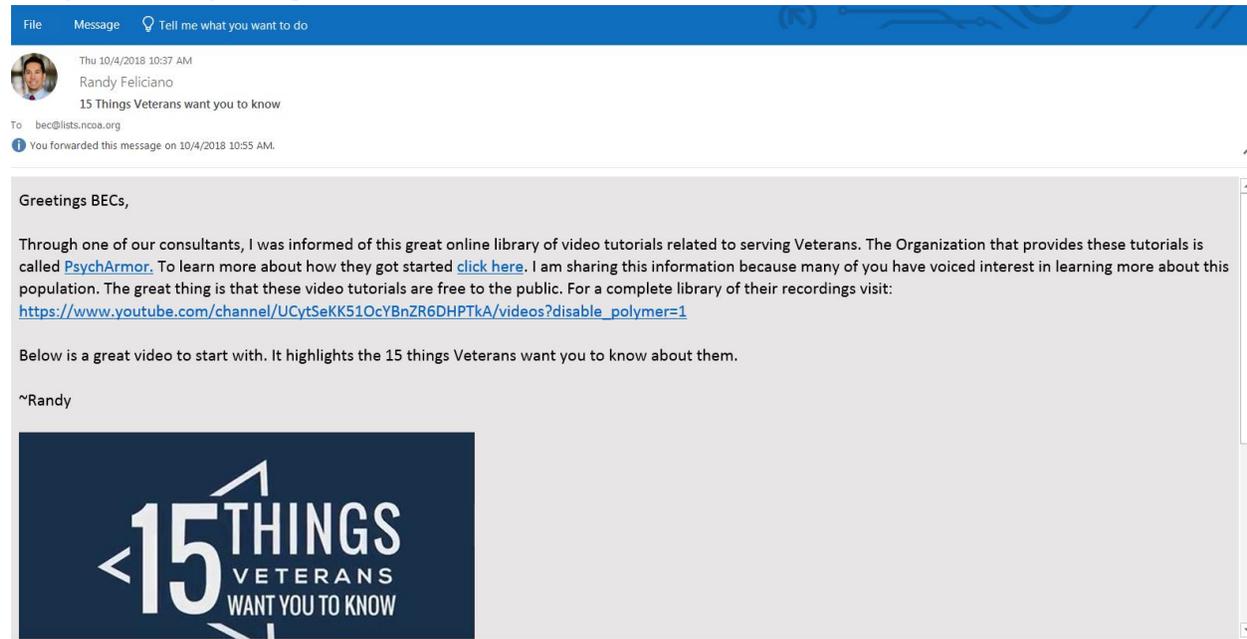
Frequency: Every other month.

BEC and SNAP listservs

The BEC and SNAP listservs are email platforms where Center for Benefits Access staff along with BEC and SNAP grantees can post important updates and news related to benefits and other resources. It is also a place for recipients to post and solicit feedback from others on the listserv. We implore all listserv recipients to post topics related to their work. BEC and SNAP grantees are invited to join the listserv associated with their projects. If you are not listed on the appropriate listserv, please contact your TA lead at NCOA and they will make sure you are

added on. Any member can send an email to the listserv; use bec@lists.ncoa.org or snap@lists.ncoa.org.

Sample listserv posting



Site visits

Site visits offer the opportunity for NCOA to meet with the grantee and strategic partners. They are also a time for us to meet key staff, volunteers, and organizational leadership. Site visits also provide the opportunity to go offsite and tour outreach and partner venues. These meetings create the space for extended conversations to address programmatic areas in need of improvement, as well as to highlight successes and, when applicable, work together on developing best practices to share with the BEC and SNAP networks.

- **Routine site visits:** Routine site visits are between 3-4 hours long. They are focused on all the areas of your project implementation. They aim to address the “how” question surrounding your project work plan and offer a time to meet your team in person and tour your office.
- **Corrective action plan site visits:** Corrective action plan site visits take place when course correction is necessary. These site visits are primarily focused on improving the approach the grantee is taking as it relates to project deliverables. See the next section for more details.
- **Capacity grant site visit** (typically for BECs): These are visits to grantees funded to provide a best practices document and other tools/resources on a program innovation(s) that can be replicated throughout the country. These site visits will be for planning purposes and to guide the creation of a best practices report. NCOA may conduct a site visit with a fully funded grantee for these same reasons listed.

- **State-wide convening:** NCOA acts as the convener of a group of grantees in a region or state, their key community partners and administering agencies to address topics related to benefits access, share resources, and address concerns affecting their state or region.

Site visits may also be a mix of any of the types listed above. However, conversations around corrective action will be held privately and only involve the grantee and any key partners who are invited to attend.

Note: Not all grantees will receive a site visit during the grant period.

Corrective action plans

Corrective action plans (CAPs) are implemented when program deliverables are lagging over time and progress towards grant goals are affected. Situations that create the lag include partners who are unresponsive, or lack of consistent venues for outreach and enrollment work, etc. CAPs should highlight key actions that will improve any program areas that are lacking and address key areas of under-performance. CAPs do not replace your project work plan but should instead serve as a supplement/complement to your approach. Your TA lead will discuss the need for a CAP when patterns of low performance are identified. Below is the format for a corrective action plan.

CASE FOR REVISION OF SCOPE OF WORK

In this section the grantee briefly describes in one paragraph or less how they arrived at the point of needing to develop a corrective action plan.

PRIOR WORK

In this section, the grantee describes the prior approaches taken and why they need to be tweaked.

IDENTIFIED CHALLENGES

The grantee provides in bullet point format the challenges that have been identified which have impeded progress.

NEXT STEPS (timeline)

In this section the grantee will detail the approaches to enhance their project work plan. The grantee will also provide a time frame for implementation and tracking of progress for each step described. This is the section where the grantee has more creative freedom to provide visuals, i.e., graphs, charts, work flows, etc.

Annual & regional grantee conferences

NCOA regularly hosts a national conference centered around key topics in the sphere of aging, including benefits access. These conferences are geared towards expanding your reach and providing the opportunity for grantees across programs to connect. The next national conference will be held in June 2019. In alternating years, there will be regional conferences focused on specific areas of the country. It is a requirement of the BEC grant that you set aside \$1,500 per year to send a representative to each of these conferences. Guidance on the national and regional conferences is provided by the Center for Benefits Access team at NCOA.

VI. BEC and SNAP Grantee Monthly Reporting

Data reporting requirements

General description of the process

Every month, BEC and SNAP grantees are required to provide key metrics to NCOA. These metrics vary to some degree between both grants. However, some of the key metrics include: number of persons assisted, total applications completed, and for BECs, the number of individual applications for the five core benefits as well as ancillary benefits. SNAP grantees are required to submit the number of screenings, number of SNAP applications submitted, and report on their outreach efforts online and in community. Both grantees are required to report a breakdown of the number of persons assisted within specific demographic categories.

Demographic questions

On the monthly reports, you will need to provide details on specific demographic categories.

The purpose of the demographic categories is to provide NCOA a full picture of the populations served. It is also a means to informing advocacy efforts, and a way for grantees to highlight potential funding opportunities for specific groups of people.

Additional details

Both groups of grantees report on the prior month's progress. The BEC monthly report form also has a section where you can update key staff changes related to the project lead and program director positions. Reminders will be sent to both BEC and SNAP grantees by the data reporting lead at NCOA. See sample reminder email below. The link to the reports will also be included. The reports themselves will be completed in the [Access to Benefits Community website](#) (see Section XIII for more information.) **Once logged in, go to the My Grant Funding tab, select your grant, and then the green button link to open the form.**

Sample email reminder for monthly reports

Dear BECs/SNAP Grantees,

This is a reminder to submit your BEC (or SNAP) reports for the month of October (the reporting period ending 10/31/2018). Please submit your report by COB on **Thursday, November 15** through the following link:

Link for BEC & SNAP monthly report: <https://ncoaging.force.com/BAC/s/login/>

Bi-annual client narratives

In addition to the monthly metrics, each grantee is required to provide **bi-annual case studies**. These narrative fields are provided at the bottom of both BEC and SNAP report forms.

Sample of an insightful client narrative

Marianne Emberton called Elder Law of Michigan because she did "...not want to be a burden on her family but needed help just buying groceries for daily living." Ms. Emberton was screened likely eligible for food assistance (SNAP) and the Medicare Savings Program, and she was set up with an appointment to apply over the phone. Following the application submission, there was a misunderstanding between Ms. Emberton and her DHHS caseworker during the approval process where the caseworker thought she had changed her mind about applying for SNAP. This was not true, so ELM staff worked to straighten out the misunderstanding, so her SNAP application could be processed.

Ms. Emberton has been approved for \$134/month for MSP and \$15/month in SNAP benefits. She was so thankful for Elder Law of Michigan's help throughout the application process that she sent our staff a thank you card. She indicated that her whole family notices she smiles more, looks happier, and is more at ease with her life. Ms. Emberton refers to our staff as her "angel group" and says we made her feel like a "...person not a case number."

Sample of a weak client narrative

One ongoing challenge that we are currently experiencing is screening and applying for benefits for individuals who already receive the benefits for which they are applying.

The problem with the narrative above is that there is no detail as to what happened next. There is no information regarding the thought process to address the concern, nor is there any background provided as to why this may be occurring. An insightful narrative response includes

the *who, what, when, where, how* and *why*, and it should be relatively short (a paragraph or so) in length. When possible, it should include the value of benefits received.

VII. Budget and Financial Reporting Requirements

Proposed budget

Before a new grant period begins, grantees are required to submit a proposed budget form with a breakdown of how grant funds will be allocated to each line item. The proposed budget is to be completed in the [Benefits Access Community](#).

Snapshot of proposed budget (similar to how it will look in the Access to Benefits Community)

Personnel					
Direct Labor *	\$	<input type="text"/>	Matching 15% Direct Labor *	\$	<input type="text"/>
Fringe Benefits *	\$	<input type="text"/>	Matching 15% Fringe Benefits *	\$	<input type="text"/>
TOTAL PERSONNEL			MATCHING TOTAL PERSONNEL		
\$ 0			\$ 0		

Other Direct Costs					
Travel *	\$	<input type="text"/>	Matching 15% Travel *	\$	<input type="text"/>
Printing/Duplication *	\$	<input type="text"/>	Matching 15% Printing/Duplication *	\$	<input type="text"/>
Supplies *	\$	<input type="text"/>	Matching 15% Supplies *	\$	<input type="text"/>
Telephone *	\$	<input type="text"/>	Matching 15% Telephone *	\$	<input type="text"/>
Postage *	\$	<input type="text"/>	Matching 15% Postage *	\$	<input type="text"/>
Advertising *	\$	<input type="text"/>	Matching 15% Advertising *	\$	<input type="text"/>

Equipment *	\$	<input type="text"/>	Matching 15% Equipment *	\$	<input type="text"/>
Consultants/ Subcontractors *	\$	<input type="text"/>	Matching 15% Consultants/ Subcontractors *	\$	<input type="text"/>
Other *	\$	<input type="text"/>	Matching 15% Other *	\$	<input type="text"/>
TOTAL OTHER DIRECT COSTS	\$	0	MATCHING TOTAL OTHER DIRECT COSTS	\$	0

Indirect Costs

Indirect Costs *	\$	<input type="text"/>	Matching 15% Indirect Costs *	\$	<input type="text"/>
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GRAND TOTAL: \$ 0

Matching 15% GRAND TOTAL: \$ 0

Interim financial report

BECs and SNAP grantees are required to submit an interim financial report covering expenses incurred by the mid-point of the grant cycle. The timeframe for the report is highlighted under section F of your grant agreement. **Note:** If you spend more than 10% than originally budgeted on any line item, a narrative statement must accompany your interim budget. In general, grantees can reallocate funds from one line-item to another throughout the grant cycle. If the reallocation is of a considerable amount of funds or you are uncertain if a planned purchase is appropriate, please discuss it with NCOA beforehand.

Example of language taken from BEC grant agreement:

F. Reporting and Evaluation Participation Requirements

GRANTEE is required to provide an interim financial report on grant expenditures as of September 30, 2019. This interim financial report is due October 31, 2019. The final financial report and final narrative report as of September 29, 2020 is due no later than October 31, 2020. A narrative must accompany both financial reports that explain any variance of 10% or greater.

Sample interim BEC budget

AGENCY NAME/ADDRESS:		NCOA BEC FINANCIAL REPORT										
Randys BEC		TYPE OF SUBMISSION:		<input checked="" type="checkbox"/> INTERIM		<input type="checkbox"/> FINAL						
1 Winners Circle Hollywood CA 90210		Costs For the Period:		1/1/2018 to 7/31/2018		Please enter data in yellow shaded cells only					(Should be zero on the Final Report)	
CATEGORIES	TOTAL BUDGET	INTERIM PERIOD ACTUALS	% of Total Budget	BUDGET REMAINING at 7/31/2018	FINAL PERIOD ACTUALS	CUMULATIVE-TO-DATE ACTUALS at 7/31/2018	% of Total Budget	CUMULATIVE-TO-DATE REMAINING at 7/31/2018				
PERSONNEL												
1 PERSONNEL EXPENSES	52,875	25,000	47%	27,875		25,000	47%	27,875				
2 FRINGE BENEFITS	36,350	17,000	47%	19,350		17,000	47%	19,350				
3 PERSONNEL SUBTOTAL	\$ 89,225	\$ 42,000	47%	\$ 47,225		\$ 42,000	47%	\$ 47,225				
OTHER DIRECT COSTS												
4 TRAVEL	1,520	1,000	66%	520		1,000	66%	520				
5 PRINTING/DUPLICATION	250	100	40%	150		100	40%	150				
6 SUPPLIES	200	100	50%	100		100	50%	100				
7 TELEPHONE	250	125	50%	125		125	50%	125				
8 POSTAGE	150	75	50%	75		75	50%	75				
9 ADVERTISING	300	150	50%	150		150	50%	150				
10 EQUIPMENT	700	350	50%	350		350	50%	350				
11 CONSULTANTS	1,125	625	56%	500		625	56%	500				
12 OTHER	5,300	2,500	47%	2,800		2,500	47%	2,800				
13 OTHER DIRECT COSTS SUBTOTAL	\$ 9,795	\$ 5,025	51%	\$ 4,770	\$ -	\$ 5,025	51%	\$ 4,770				
14 OVERHEAD COSTS	\$ 980	\$ 503	51%	\$ 477	\$ -	\$ 503	51%	\$ 477				
15 GRAND TOTAL	\$ 100,000	\$ 47,528	48%	\$ 52,472	\$ -	\$ 47,528	48%	\$ 52,472				
16 COSTS TO DATE		\$ 47,528			\$ -	\$ 47,528						
17 PAYMENTS RECEIVED TO DATE					\$ -	\$ -						
18 AMOUNT (OVERDRAWN) or UNDERDRAWN		\$ (47,528)			\$ -	\$ (47,528)						
ESTIMATED IN-KIND CONTRIBUTION THROUGH		7/31/2018	5,000									
AGENCY CERTIFICATION: Amounts claimed on this report constitute allowable costs in accordance with the terms of the contract.												
AUTHORIZED SIGNATURE OF AGENCY: _____												

Arrows in the document above show the fields that need to be completed.

Fields to fill out in the budget form

Make sure to include your total budget line items in column 1. These items are listed on your proposed budget. Then add in your expenditures in the first highlighted area. The form will automatically make the deductions across the spreadsheet. When completing the final budget, add in your expenditures in the second yellow column (see sample below). Lastly, make sure to include an authorized signature and fill out the information next to all the blue arrows.

Sample BEC final budget

AGENCY NAME/ADDRESS:		NCOA BEC FINANCIAL REPORT									
Randys BEC		TYPE OF SUBMISSION: (please mark one)		INTERIM		FINAL					
1 Winners Circle Hollywood CA 90210		Costs For the Period: 1/1/2018 to 7/1/2019 <i>Please enter data in yellow shaded cells only</i>									
CATEGORIES	TOTAL BUDGET	INTERIM PERIOD ACTUALS	% of Total Budgeted	BUDGET REMAINING at 7/1/2019	FINAL PERIOD ACTUALS	CUMULATIVE-TO-DATE ACTUALS at 7/1/2019	% of Total Budget	CUMULATIVE-TO-DATE REMAINING at 7/1/2019			
PERSONNEL											
1 PERSONNEL EXPENSES	52,875	25,000	47%	27,875	27,875	52,875	100%	-			
2 FRINGE BENEFITS	36,350	17,000	47%	19,350	19,350	36,350	100%	-			
3 PERSONNEL SUBTOTAL	\$ 89,225	\$ 42,000	47%	\$ 47,225	\$ 47,225	\$ 89,225	100%	\$ -			
OTHER DIRECT COSTS											
4 TRAVEL	1,520	1,000	66%	520	520	1,520	100%	-			
5 PRINTING/DUPLICATION	250	100	40%	150	150	250	100%	-			
6 SUPPLIES	200	100	50%	100	100	200	100%	-			
7 TELEPHONE	250	125	50%	125	125	250	100%	-			
8 POSTAGE	150	75	50%	75	75	150	100%	-			
9 ADVERTISING	300	150	50%	150	150	300	100%	-			
10 EQUIPMENT	700	350	50%	350	350	700	100%	-			
11 CONSULTANTS	1,125	625	56%	500	500	1,125	100%	-			
12 OTHER	5,300	2,500	47%	2,800	2,800	5,300	100%	-			
13 OTHER DIRECT COSTS SUBTOTAL	\$ 9,795	\$ 5,025	61%	\$ 4,770	\$ 4,770	\$ 9,795	100%	\$ -			
14 OVERHEAD COSTS	\$ 980	\$ 503	61%	\$ 477	\$ 477	\$ 980	100%	\$ -			
15 GRAND TOTAL	\$ 100,000	\$ 47,528	48%	\$ 52,472	\$ 52,472	\$ 100,000	100%	\$ -			
16 COSTS TO DATE		\$ 47,528			\$ 52,472	\$ 100,000					
17 PAYMENTS RECEIVED TO DATE					\$ -	\$ -					
18 AMOUNT (OVERDRAWN) or UNDERDRAWN		\$ (47,528)			\$ (52,472)	\$ (100,000)					
ESTIMATED IN-KIND CONTRIBUTION THROUGH 7/1/2019		5,000				10,000					
AGENCY CERTIFICATION: Amounts claimed on this report constitute allowable costs in accordance with the terms of the contract.											
AUTHORIZED SIGNATURE OF AGENCY:											

Arrows in the document above show the fields that need to be completed.

Budget justification & narrative questions

A budget justification statement must accompany your final budget form upon submission. Any expenses exceeding 10% budgeted on any line item must be explained. Below is an appropriate budget justification statement.

Additionally, narrative responses to a handful of questions related to your grant must be completed along with your final budget. **The narrative questions only need to be completed one time towards the end of the grant cycle via an online form. The narrative questions can be found via a link that will be provided to you by NCOA.** For viewing, the online narrative form is included in Appendix A.

Sample budget justification

NCOA Financial Report Budget Justification

XYZ BEC

Grant Period: 3/1/16 – 12/31/17

Budget justification for line items: **Travel and Postage**

Travel – We were over budget on this line item by 10.2%. Staff drove more miles conducting outreach than was anticipated in the original budget.

Postage – We were over budget on this line item by 75%. We mailed out more applications and authorization forms than anticipated. We also used stamps to pre-pay for postage on the return envelopes.

VIII. BenefitsCheckUp®

BenefitsCheckUp® (www.BenefitsCheckUp.org) is NCOA's free online tool that connects older adults with benefits they may qualify for. Since its launch in 2001, BenefitsCheckUp® has helped more than 7.3 million people find over \$28 billion in benefits. It is the nation's most comprehensive, web-based service providing benefit programs to older adults with low income and resources.

BenefitsCheckUp® screens for more than 2,500 public and private benefit programs for all 50 states and the District of Columbia. The programs available are different for each state. Some programs are available nationwide while others are state-specific or available locally such as in a specific county, town, city, or zip code. Users can select the categories of programs that interest them including prescription drugs, health care, housing and utilities, food and nutrition, tax relief, veterans' benefits, and employment. As such, every screening is different and unique to each user.

BenefitsCheckUp® offers many helpful tools on the website. Users can apply online for the Medicare Prescription Drug Coverage (Part D) Low Income Subsidy (LIS/Extra Help) at: <https://www.benefitscheckup.org/medicare-rx-extra-help-application-intro-page/>. This tool links directly to the Social Security Administration (SSA) so users can know right away whether their application submission was successful. As an added bonus to filling out the Extra Help/ LIS Online Application through the BenefitsCheckUp® site, the program utilizes the information to run an eligibility diagnostic in the background and will let the applicants know right away whether there are other key benefits they may be eligible for.

BenefitsCheckUp® also has a **SNAP Map** (<https://www.benefitscheckup.org/resources/snap/>) that provides quick and easy access to program information as well as application forms for the Supplemental Nutrition Assistance Program (SNAP) in all 50 states, District of Columbia, Puerto Rico, Guam, and U.S. Virgin Islands.

BenefitsCheckUp® utilizes enhanced mapping technology to create Office Locator Tools. In addition, BenefitsCheckUp® has created an Application Form Center that provides all available online and paper application forms for all of the benefit programs in its database. There are over 1,800 application forms and instructions in multiple languages that are available for download.

Grantee version of BenefitsCheckUp®

BEC grantees have access to a grantee version of BenefitsCheckUp®. The link for this will be provided by NCOA. See screen image below of the landing page. **If you do not see this landing page when you open up BenefitsCheckUp®, you are probably on the consumer site, which does not collect your BEC screening data.** SNAP grantees track their screenings but are not mandated to track it in any one way. SNAP grantees can use an internal screening, but some use the BCU public version to do screenings.



Welcome to BenefitsCheckUp®

Select your state and Benefits Enrollment Center below to proceed.

Select Your State

-- choose a state --

then

Select Your Organization

-- choose an option --

Enter

Not a Benefits Enrollment Center?

[Visit BenefitsCheckUp.org](http://BenefitsCheckUp.org)

How to use BenefitsCheckUp®

BenefitsCheckUp® offers a quick pre-screen and a more comprehensive screening option.

Quick pre-screen option

This option let users answer a short set of questions (about 7-8 questions) and get quick information about the types of programs that are available in their location. The quick pre-screen does not make a full determination of eligibility for these programs. Users will need to continue with the questionnaire to find out if they are eligible for the programs listed.

Comprehensive screening option

By continuing with the questionnaire and answering a few more questions, users will get a program results list that is tailored to their situation and which also closely determines whether they are most likely to be eligible for these programs. By going through the full questionnaire

process, users will get a lot of detailed information about the program including application forms (in multiple languages, if available), program websites, and local contacts.

Additional information regarding BenefitsCheckUp®

Within the last few years BenefitsCheckUp® completed a site redesign where control of the questionnaire is now placed with the user. Users have the option to select which types of programs they are interested in getting information about. By choosing the program categories to screen for, users are creating their own questionnaire. Generally, the more categories selected, the longer the questionnaire. Certain program categories ask more questions because the nature of the programs included have extensive eligibility rules.

Selection of program categories alone does not determine how long or short the questionnaire can be. As the questionnaire is dynamic, more or fewer questions will be asked depending upon answers provided to previous questions. Therefore, two users selecting the same set of categories to screen for can take longer or less time to complete the questionnaire. The unique attribute of BenefitsCheckUp® is that all questions asked are necessary to determine eligibility for each set of programs.

Other recently added features include:

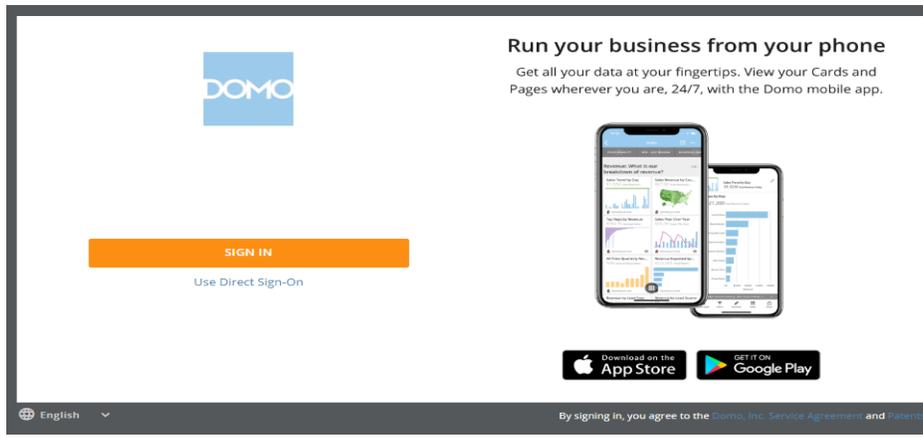
- **LiveChat** allows older adults to discuss their challenges and identifies resources that may provide solutions. BenefitsCheckUp® also has a LiveChat feature that helps users throughout the questionnaire process. The online chat feature uses artificial intelligence and team members who can answer questions on how to use the questionnaire and navigate through the site. Users can ask any questions on LiveChat; however, the feature is best used for questions concerning the questionnaire process and general questions about benefits programs and what to expect once an individual receives their personalized report. 
- **The mobile-ready site** allows users to use the site anywhere, anytime. All parts of the site are responsive and can be used on tablets and smartphones wherever users need to get on the site. This is very helpful to socially isolated users who may not have access to a desktop but have a smart phone. In addition, older adults who are socially isolated can get help from family members or friends wherever they are. The BenefitsCheckUp® results and fact sheets are all printable and can be saved as a PDF. Therefore, no matter what device or where the site is used, the results can be saved and printed later when users have access to a printer. 

BEC screening data: DOMO

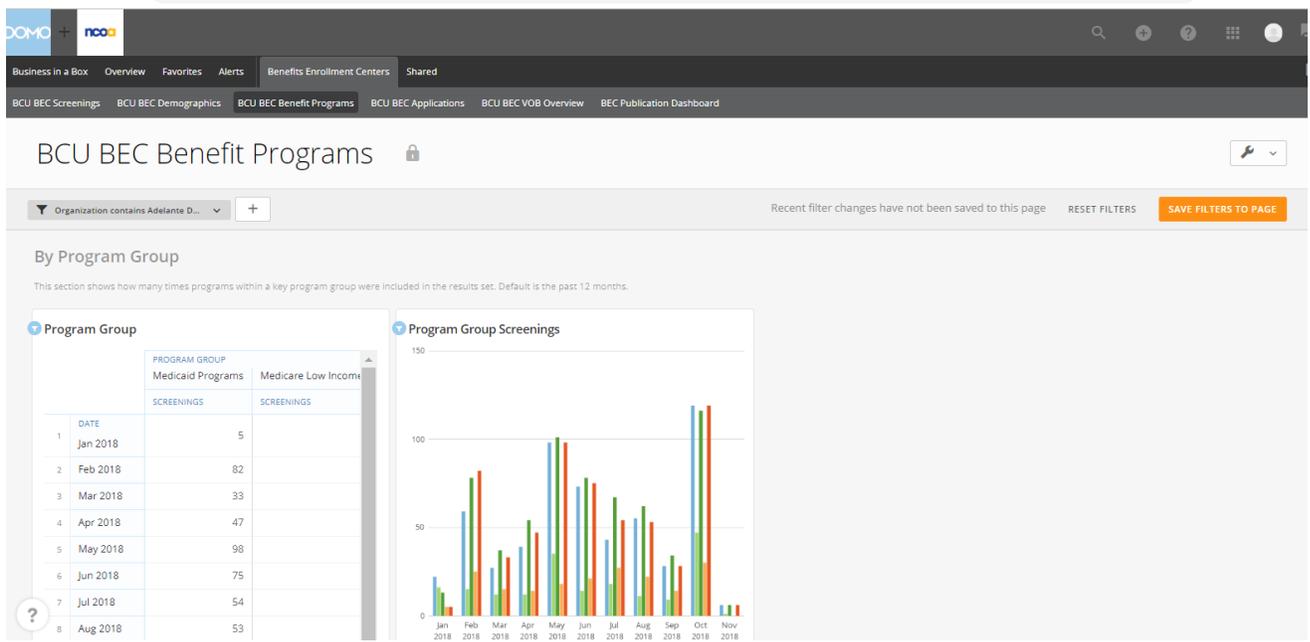
DOMO is the backend software that creates reports and graphs of your BenefitsCheckUp® screening data. More than that, DOMO is also used by NCOA to tie in your key program data sets. Below is an image of the landing page for DOMO, which you will access via the BCU grantee portal. **Keep in mind the commercial/public facing site does not keep your screening data, and it does not allow access to DOMO. To view your screening data, you need to log in through the grantee version of BenefitsCheckUp®.**

The screenshot shows the login page for the DOMO tool. At the top left, there are logos for BenefitsCheckUp (National Council on Aging) and NCOA (Center for Benefits Access). On the top right, it says "Welcome Tri-Valley" with links for "Login", "Grantees List", and "Resources & Forms". Below the logos is a red "Disaster Relief" notice. A navigation bar contains "Home", "Find Benefits", "Medicare Rx Extra Help", and "Food & Nutrition", with "A A A" on the right. The main heading is "Welcome to the Login Page". The body text states: "This feature is available to BenefitsCheckUp® private label users and grantees of the Center for Benefits Access. Log into this page to access statistical reports about your screening and application activities. You can also access additional outreach materials." Below this is a form with "Username" and "Password" labels, each followed by a text input field. An orange "Login" button is centered below the fields. At the bottom, there is a section for "Questions or problems logging in?" with contact information: "Please contact Customer Support at: support@benefitscheckup.org, if you have encountered any difficulties logging into the page or have questions about how to use the tool."

Once you log in you will be taken to DOMO. When prompted use the **direct sign-on option**. You will then enter an email and password which will be provided to you by the BenefitsCheckUp® team at NCOA.



Below: Screen image of Domo. (This is where you can view your screenings and other BEC stats).



For a guided video tour of DOMO please visit: <https://vimeo.com/226760948/7ee5544dc6>.

IX. Partnerships & Outreach

Purpose of partnerships

Partnerships are an essential component of your BEC and SNAP projects. Key partnerships open the doors to potential clients, create opportunities for program expansion, and strengthen your education and advocacy efforts.

Identifying potential partners will be a critical piece of your community mapping process as you start to implement your project. In this phase, it is important to take stock of your organization's

strengths and weaknesses and determine where other agencies in your community can fill in those gaps. You will want to ask yourself:

- Who in my community is best suited to do the things that are difficult or that my organization cannot do?
- What audiences is my organization not serving, or not serving well, and who has access to that audience?
- What are the gaps that no one among my current network is filling, and who is the most promising player to fill those gaps?

When thinking of partners, you'll want to identify who is already at the table and who is not, but moreover, what incentives bring those groups to the table. What are potential partners' goals and constraints? What are the win-win-win opportunities for your organization, your partners, and your clients?

Types of partnerships

When building partnerships, find organizations that echo your message and have access to resources that you may not have. Create your partnership network by understanding what problems you want to solve and locating others interested in addressing those same issues. A few organizations to consider partnering with include:

- Local offices of agencies administering benefits (e.g., Social Security office, Department of Health/Family Services, Community Action Agencies)
- Other aging and disability agencies, such as Aging and Disability Resource Centers, Centers for Independent Living, etc.
- Senior housing complexes
- Food banks/pantries
- Health providers
- Faith communities
- Ethnic/cultural affiliation groups
- Community locations frequented by Medicare beneficiaries: pharmacies, public libraries, dollar stores, VFWs, etc.

In the spring of 2018, the Center for Benefits Access and the Social Security Administration (SSA) finalized a joint letter to address the need for BECs to connect with their local SSA office to help with benefits-related issues affecting their clients. The purpose of this letter was to start the connection process between the BEC and the local SSA office in their area via a Public Affairs Specialist. To facilitate this connection for your BEC, please follow the instructions in the letter included in Appendix B of this guide.

Evaluating potential partners

Appendix C includes a sample checklist of organizational characteristics that could be useful in identifying partner organizations to implement benefits outreach and enrollment activities. It is specific to the Part D Low Income Subsidy (LIS/Extra Help) but can be modified for outreach and enrollment for other benefits.

Purpose of outreach

While some grantees are able to build their benefits caseload by serving existing clients that come through their organization's programs or intake process, all BECs and SNAP grantees should consider what outreach strategies can attract clients who may not already be in touch with the organization.

Any outreach strategy should include an outline of the specific audiences and areas targeted, messaging that will be used to reach those individuals, strategies, and ways of evaluating the success of that outreach.

Finding potential clients

You may already have a sense of where in your community there are low-income Medicare beneficiaries who may be missing out on SNAP and other benefits. NCOA has developed a series of data visualization tools (www.ncoa.org/visualizations) that can help.

Each year, for example, NCOA receives zip-code level data from Social Security regarding where SSA sends letters to Medicare beneficiaries who may be eligible for Extra Help or MSPs. This is mapped (www.ncoa.org/lismap) to allow counselors the opportunity to see where concentrations of these individuals reside. Other maps in the series showcase where there are pockets of low-income individuals who have limited English proficiency, are Native American, or receive Social Security disability benefits.

Messages that work

In 2016, NCOA hired M+R and PerryUndem Research/Communication to help us identify what compels low-income older adults to learn about and apply for public benefits they may be missing out on, and where older adults get their trusted information.

The results revealed that traditional media is still popular with this audience; that Medicare, Social Security, and health providers are trusted resources for unbiased information; and that while knowledge of Medicaid and SNAP were high, few older adults knew about the MSPs or LIHEAP.

The study also found that the key benefits-related message that resonated with low-income Medicare beneficiaries was “Help for people on fixed incomes is important because the cost of living goes up, but our incomes do not.” Other key messages included:

- Money for groceries can make it easier to eat healthy food and prevent getting sick.
- Help with prescription drugs can save up to \$4,000 a year.
- Help can mean less worry and stress about making ends meet.

More about the research findings can be found at:

<https://www.ncoa.org/centerforbenefits/outreach-toolkit/what-the-research-says/>.

Types of outreach

Outreach can take on a wide range of formats, from one-time in-person health and community fairs, to online advertising, to using radio and television ads, to out-stationing a staff member at a community location frequented by your target audience. Here is just a sample of several strategies used by the BEC/SNAP network of grantees.

Large-scale health fairs

Having relationships with large healthcare systems, plus federal and state agencies, can be an important way to gather interest in large-scale health fairs. By partnering with large agencies and organizations to host a benefits fair, this not only helps draw large crowds, it also provides the opportunity for strengthening relationships with administering agencies and drawing support from elected officials.

Facebook advertising

Paid Facebook ads can be an effective way to reach low-income older adults who may not know about your organization and services but may be eligible for benefits. Ads appear in the user’s news feed and can be tailored to specific groups of people based on location, demographics, and interests. You can use ads to either promote an event or information on a website, or to gather information from users via an online form to contact them directly for a benefits screening.

NCOA has piloted several efforts at using Facebook ads to conduct benefits outreach. Learn more in our Facebook toolkit at: <https://www.ncoa.org/centerforbenefits/outreach-toolkit/facebook-advertising/> and from a recorded webinar on this topic at: <https://www.ncoa.org/resources/webinar-benefits-outreach-via-social-earned-media/>.

Earned media

Earned media is the opposite of paid media; it is any free media coverage secured by approaching (“pitching”) reporters at local print, radio, and TV outlets. Earned media can be a great, cost-effective way to get the name of your organization and its services out to a broad audience. Learn more in our outreach toolkit at:

<https://www.ncoa.org/centerforbenefits/outreach-toolkit/earned-media/>.

Telephone town halls

Telephone town halls (or tele-town halls) are meant to simulate an in-person town hall, like those a member of Congress might hold in their district. They are an opportunity to get a lot of people together in one place (or in this case, on one phone line) to tell them about the work you are doing to connect seniors with benefits, and to answer common questions.

There are upfront costs in conducting a tele-town hall, but they are a unique mechanism to reach potentially hundreds of clients in a short time. Our outreach toolkit provides everything you need to consider when hosting such an event:

<https://www.ncoa.org/centerforbenefits/outreach-toolkit/telephone-town-halls/>.

Utilizing partnerships in outreach

Regardless of what strategy your organization employs for outreach, involving partners in your efforts provide an opportunity to exponentially increase the number of people you reach. Here are just a few examples of what several of your peers have done to leverage partnerships for outreach:

- AgeOptions in Oak Park, IL, a current dual BEC and SNAP grantee, has built relationships with their local congregate meal sites which do outreach on SNAP assistance and other enrollment programs.
- The Washington County Commission on Aging, a BEC in Maryland, created a strategic relationship with a local hospital system and by doing that has received referrals for those in need of services after discharge, thereby reducing hospital readmissions for the health system.
- The Chinese Community Center, a BEC in Houston, TX, has a strong relationship with a health plan, which has recently opened an Asian Resource Center that refers people to the BEC.
- In Nevada, Three Square, a SNAP grantee, created a partnership with local grocery stores and through that effort they distributed 99,000 pounds of produce in 2018 as a form of widespread benefits outreach and education.

- Elder Law of Michigan, a current dual BEC and SNAP grantee, suggests creating co-branded materials with the partnerships you created with other community groups to help with outreach.

Evaluating outreach efforts

Regardless of which tactic you employ, your organization should have a plan in place to be able to track and measure the success of your outreach efforts. This may be as simple as asking a new client about how they heard about your work on an intake form/interview. You can also use your grantee data collected to analyze how well you are reaching specific audiences, e.g., veterans, and periodically survey clients about where they first heard about your organization.

X. Advertising and marketing

Logo use/NCOA language

NCOA maintains strict control over the use of its logo in marketing materials. You are not required to cobrand your grantee materials with NCOA, but if you would like to do so, you must contact us to obtain a copy of the logo and brand guide explaining its proper usage. Grantees must also send us a copy of the marketing materials in which you wish to include the logo for prior approval. Any materials produced with grant funding should contain an acknowledgement to the effect that “This [product] has been produced in part from a grant awarded by the National Council on Aging (NCOA). All opinions expressed herein are those of [agency name] and not NCOA.”

BEC press release template

Appendix D includes a sample press release about BEC services that you can tailor with your organization’s information.

Story collection/consent forms

Whenever possible, NCOA likes to use actual names and photos of individuals assisted in order to share the story of grantees’ success and demonstrate the social impact of benefits access. However, we recognize that not all clients may wish to share their name and image, but still may be willing to share details of their experience under a pseudonym.

When submitting case studies, please obtain clarification over whether the individual is willing to share their story publicly and indicate whether the name is a pseudonym. Grantees should use the client consent form in Appendix E to obtain written permission from those who are open to sharing their story publicly.

XI. Sustainability

Thinking about sustaining your benefits outreach efforts beyond the life of the grant period is essential to its long-term survival. The foundational step in planning for sustainability is to consider what your priorities are for the program in the future, how much will it cost, and whether the environment supports those efforts for the long term. NCOA has a helpful questionnaire at <https://www.ncoa.org/resources/building-business-and-sustainability-skills-planning-exercise/> that can help you think critically about these concerns.

Where to find additional funding sources

There are many ways to raise additional money to support and sustain your benefits access work for future years:

1. Expand your efforts to secure funding from corporations who have more flexible funding compared to foundations and government funders
2. Aim to have 60% of your revenue come from individual giving, especially small donations from the people who have been impacted by your services in the community
3. Activate champions on your board or communication committee and ask that they either donate themselves or get others to donate or both
4. Look for local and regional funding opportunities and make your case by measuring and reporting on your success on impacting the community in a qualitative and quantitative way. The demographic data on current clients may provide opportunities for soliciting funds from certain organizations targeting specific populations.

Learn more from NCOA's recorded webinar on Building Sustainability for your Benefits Enrollment Programs: <http://cc.readytalk.com/play?id=b0i9jk>.

XII. The Value of Volunteers

There is tremendous value in utilizing a volunteer workforce for your BEC or SNAP grant. As a matter of fact, [according to the Independent Sector](#), volunteers contribute an average of \$24.69 of value per every hour of volunteer work.

There are many types of volunteers to consider; they include but are not limited to the following:

1. Student interns: Consider a Memorandum of Understanding with a local college or university.

The benefit: Student interns will be required to perform well for a passing grade or to meet licensing requirements.

The downside: Student assignments end after a semester, quarter, or year.

2. Skilled volunteers ([AmeriCorps-VISTA](#)): AmeriCorps/VISTA volunteers are skilled individuals from all walks and professional backgrounds.

The benefit: They are fast learners and experienced.

The downside: There is a cost associated with hosting a VISTA volunteer.

3. [Senior Corps volunteers: Retired Senior Volunteer Program \(RSVP\)](#) - Senior Corps RSVP volunteers are part of a network of national service programs for Americans 55 years and older, made up of three primary programs that each take a different approach to improving lives and fostering civic engagement. Senior Corps volunteers commit their time to address critical community needs including academic tutoring and mentoring, elderly care, disaster relief support, and more.

The benefit: RSVP volunteers are diverse and experienced.

The downside: There is a cost associated with hosting a RSVP volunteer.

4. Community volunteers: These are individuals, often older adults themselves, who represent the community you serve and may want to become more involved in serving their peers.

The benefit: You get to recruit and hand select these volunteers. Word of mouth from the community is also beneficial when recruiting community volunteers.

The downside: You will have to find, train, and supervise these volunteers.

Having a comprehensive plan to recruit, train, and retain volunteers is essential. Here are several promising practices from your peers about how they've managed volunteers for their benefits work:

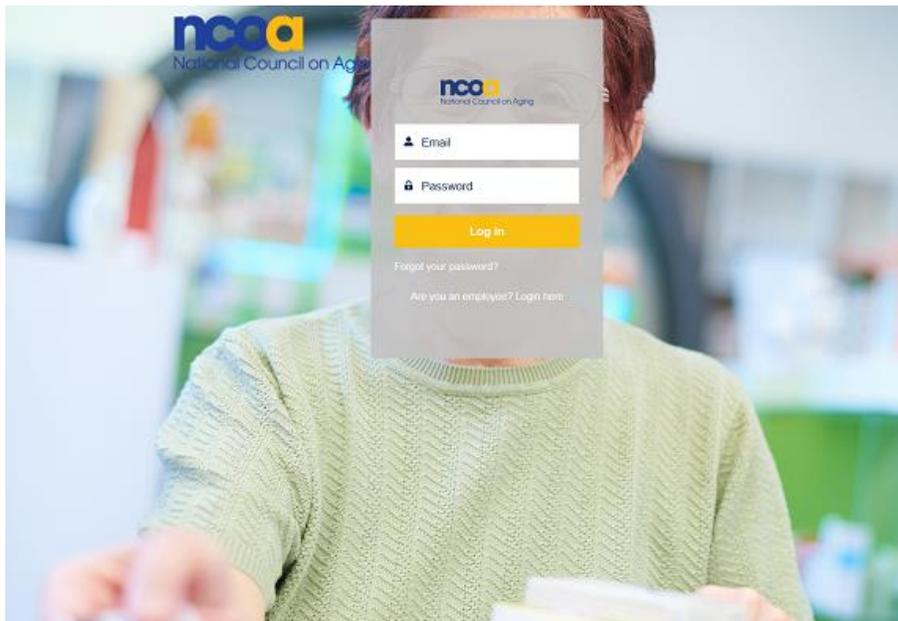
- Adelante Development Center, a BEC in Albuquerque, NM, has shared this volunteer training manual: <https://www.ncoa.org/resources/benefits-enrollment-center-sample-volunteer-manual/>
- LiveOn NY, a New York City-based BEC, has managed to build trust with their community through the use of peer-to-peer volunteers: <https://www.ncoa.org/centerforbenefits/promising-practices/finding-people/peer-volunteers/>
- Hana Center (formerly Korean American Community Services, a Chicago BEC serving Asian seniors) created a Silver Giving Circle to recruit and retain Korean speaking volunteers: <https://www.ncoa.org/centerforbenefits/promising-practices/finding-people/silver-giving-circle/>.

XIII. Important Resources

Access to Benefits Community

Starting on November 1, 2018 for SNAP grantees and in January 2019 for BECs, all Center for Benefits Access grantees will have access to the newly created Access to Benefits online community. This site was created to provide a place where grantees can access vital information on their grants from reports, to reminders of upcoming webinars, to an online chat feature to connect with other grantees in the network, plus more! To learn about the new community please click [here](#) for a video tutorial. To access the Benefits Community, click [here](#).

Login page



Landing page

The screenshot shows the landing page for the Benefits Access Community. At the top, there is a blue navigation bar with the NCOA logo and links for 'MY APPLICATIONS', 'MY GRANT FUNDING', 'DISCUSSION', 'FILES & RESOURCES', and 'CONTACT US'. Below the navigation bar, a large banner reads 'WELCOME TO THE BENEFITS ACCESS COMMUNITY!' with the subtitle 'Helping low-income older adults with daily costs by enrolling them in benefits to pay for prescription drugs, medical care, food, or heat for their homes.' To the left of the banner is a photo of a diverse group of older adults with the text 'Thank you for being a partner of NCOA' and a button that says 'Manage your benefits access grant'. To the right, there is a section for 'INSTRUCTIONAL VIDEO:' with a link to 'Managing your Grant in the Benefits Access Community'. Below that is a section for 'Upcoming Webinars' featuring a 'Grantee Network Call' on '1 Nov 2018'. The 'November 2018' webinar is scheduled for 'November 1st, 2018; 3-4pm ET' and provides details for 'Readytalk' and an 'Access Code: 4796976#'. An 'Announcements' section at the bottom left contains a 'Welcome!' message dated '11/1/2018' that thanks users for joining the community and explains its purpose for managing grant activities.

Lessons learned from the BECs

NCOA has published a series of lessons learned reports summarizing what several generations of BECs have experienced when implementing their grants, from challenges to successes with partnerships, outreach, and staffing. Find all of these in our Resource Library (www.ncoa.org/resources) by searching under the terms, lessons learned benefits access. You can also find sample outreach materials in the Resource Library by searching for “sample”. In addition, several BECs have shared their failures with the hope of helping new enrollment centers learn what not to do when setting up their program. These are outlined at: <https://www.ncoa.org/centerforbenefits/becs/learning-from-failure-bec-tips/>.

SNAP toolkit/resources

NCOA’s Senior Hunger & SNAP page (<https://www.ncoa.org/economic-security/benefits/food-and-nutrition/senior-hunger-snap/>) provides links to a wide range of best practices guides, outreach materials, fact sheets, and other information that can be helpful for grantees to use in conducting their enrollment activities. These resources include:

- A **Senior SNAP Enrollment Promising Practices Brief** summarizing promising practices in outreach, application assistance, and follow-up from four grantees awarded in 2015.
- The **Seniors and SNAP Best Practices Handbook**, which explores best practices and how they can be replicated nationwide.

- **Sample messages** to help spread the word about SNAP in your community.
- **Customizable materials** that can be distributed in places where older adults gather, shop, learn, work, and access other services.

Sample BEC data progress tool

This sample spreadsheet provides an example of how a BEC can effectively track the number of benefits applications submitted for monthly reporting purposes. *This sample does not include the demographic fields required on your monthly report, but it gives you an idea of how you can track your progress using a spreadsheet in the absence of a case management tool.*

<https://www.ncoa.org/resources/bec-sample-data-reporting-tool/>.

Promising practices clearinghouse

The Center for Benefits Access has compiled a clearinghouse of promising practices (<https://www.ncoa.org/centerforbenefits/promising-practices/>) to share innovative approaches that have worked in improving benefits outreach and enrollment. Each practice includes contact information, when available, for an individual at the agency who oversaw the activity and is willing to discuss it in further detail.

Center webinars

The Center for Benefits Access hosts between 7-10 webinars each year covering a wide range of topics related to benefits access and improving economic security for vulnerable populations. All of these webinars are open to anyone who wishes to attend; slides and recordings are made available following the event. Webinar announcements are posted to NCOA's events page; recent webinars are linked from www.ncoa.org/ncboewebinars and available on the Center's Vimeo channel at www.vimeo.com/channel/ncboe.

Benefits Alert newsletters

Benefits Alert is an e-newsletter published by the Center twice a month. The newsletter contains events and resources from the Center, policy news affecting benefits programs, data and reports from our partners, and promising practices. To subscribe, visit

<https://www.ncoa.org/get-involved/sign-up/>; your email will be held only by NCOA and not used for any commercial ventures. You may unsubscribe at any time.

Grantee contact lists

NCOA maintains two separate lists of our BEC and SNAP grantees:

- BECs: <https://www.ncoa.org/resources/bec-contact-list/>
- SNAP: <https://www.ncoa.org/seniorhunger>

XIV. Key NCOA Contacts

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BenefitsCheckUp® Support Team

BenefitsCheckUp®

support@benefitscheckup.org

Appendix A: Sample Final Reporting Online Form (narrative responses)

This is a sample only. Please visit the Benefits Community for the most current version of the form.

The screenshot shows a web form titled "Final Reporting Form for Benefits Enrollment Centers" with the NCOA logo in the top right. The form includes a dropdown menu for "Benefits Enrollment Center", an email field with "example@sample.org", and a "Browse..." button for uploading a financial report. A blue arrow points to the "Browse..." button. A red text box on the right says "PLEASE do NOT send Budget document via email. Instead upload here". Below the email field is an example text area with a scroll bar. At the bottom is a "Narrative" section with instructions and a large text area for the response.

Final Reporting Form for Benefits Enrollment Centers

ncoa
National Council on Aging

* - Required

Benefits Enrollment Center *
Please select...

Your e-mail (optional - a copy of your responses will be sent for your records)
example@sample.org

Please upload your final financial report here. *
Browse...

PLEASE do NOT send Budget document via email. Instead upload here

Example: Overhead- Because our model used more technological solutions, some overhead costs were more than 10% of the budget, such as telephone costs (which includes our costs for bandwidth). Also, we used a significant amount of postage advertising services, which was not originally indicated in the grant proposal.

Narrative

There is no character or word limit for these responses. Please provide as much detail as necessary. In general, most responses should be about two paragraphs long.

Describe the model your organization used for outreach and enrollment of low-income older people and people with disabilities into benefits for which they qualified. What do you consider the strengths and weaknesses of your model? *

Image continued on next page...

Did you meet your qualitative and quantitative goals for the project? Why or why not? *

With what special populations did you work? How did you approach these populations, and what strategies worked or did not work in reaching them? *

What key partners did you enlist in your project? Please make special note of any non-traditional partners with whom you joined. *

What key partners did you enlist in your project? Please make special note of any non-traditional partners with whom you joined. *

!!!!!! IMPORTANT!!!!!! You must confirm your answers on the following page

Submit

Appendix B: Joint Letter from NCOA and Social Security



Dear [*Benefits Enrollment Center*]:

Thank you for providing services to our most vulnerable citizens. With your help, we are able to provide services to thousands of older adults and people with disabilities.

Recently, representatives from the Social Security Administration and the National Council on Aging met to discuss how to increase collaboration among Benefits Enrollment Centers and the local Social Security offices in your area. Together we developed a new strategy for connecting you with your local Social Security representative, which we've outlined below. We encourage you to follow these simple steps to ensure that we are providing the best service to the citizens we serve.

For Benefits Enrollment Centers who currently DO NOT have an ongoing relationship with a local Social Security field office, you may visit Social Security's website, www.socialsecurity.gov to select and submit a request at the [Ask for a Speaker](#) link found under the *Menu/Agency Information*. This will initiate a meeting request with the local Public Affairs Specialist or Social Security representative, who will provide information on Social Security's programs, benefits and services; similarly, you will share information about the services you provide in your communities.

This meeting may include: (a) an overview of Social Security; (b) a virtual tour of Social Security's website and SSA Express; (c) publications and other public information materials for use in high traffic areas; and (d) answers to any questions you may have about Social Security. You in turn will want to also provide information about your services, website, and how you communicate and interact with the community. Following this initial meeting the Social Security representative will remain your point of contact and can address any issues or concerns, can conduct presentations and/or provide informational materials for the local community efforts.

For Benefits Enrollment Centers who already have an established relationship with a local Social Security field office, you will not need to do anything and should continue to work through your current contacts.

We believe this new process will help in aiding us in areas where there is a need and allows us to build an effective working relationship with our partner. Thank you for your continued support and dedication. We look forward to hearing from you soon and getting some feedback.

James Firman
CEO
National Council on Aging

Bob Patterson
Acting Associate Commissioner
for External Affairs
Social Security Administration

Appendix C: Sample Partner Checklist

Potential Partner Organization Checklist

Based on experience implementing a partner-based, pay-for-performance LIS outreach and enrollment model, it has been noted that there are certain organizations that may be more successful in this model than others. The following is a checklist of organizational characteristics that could be useful in identifying partner organizations to implement a partner model for LIS outreach and enrollment.

- Revolving client base**
*An organization that serves a constant caseload may be a suitable partner on a short-term basis, however; for ongoing outreach and enrollment efforts a partner should have ongoing access to a broader range of potential enrollees.
- Significant contact with target population**
*Some potential partners will not have a great deal of contact with lower income populations, and this can be a determining factor in their ability to implement this model.
- Outreach Capability**
*An organization must have the means (staff, time, outreach material, etc.) to do outreach.
- Leadership Buy-in**
*The buy-in of the leadership at partner organizations is critical. This is what will drive staff motivation and participation.
- Trained staff/volunteers**
*Ideally potential partners will be familiar with Medicare Part D, however many potential partners will be relatively new to LIS and the complexities of Medicare Part D. Training opportunities need to be available and ongoing as needed.

Appendix D: BEC Press Release Template

INSERT ORGANIZATIONAL LOGO

INSERT ORGANIZATIONAL CONTACT DETAILS

FOR IMMEDIATE RELEASE

[NAME OF ORGANIZATION] Expands Effort to Help Low-Income Medicare Beneficiaries Afford Basic Living Expenses

City, State (January XX, 2019) – **NAME OF ORGANIZATION** has partnered with the National Council on Aging (NCOA) to expand assistance to people with Medicare in **GEOGRAPHIC AREA** to improve their financial security.

Nationally, half of all people with Medicare live on incomes less than \$26,200/year, and often lack the resources needed to meet basic living expenses. Several benefit programs exist to help these individuals with the costs of health care, prescriptions, food, and more.

“These programs can be real lifelines for people on Medicare in **[NAME OF COMMUNITY]**, but often they don’t know that assistance in making ends meet is out here,” said **[NAME AND TITLE OF ORGANIZATIONAL REPRESENTATIVE]**. “[**NAME OF ORGANIZATION**] this opportunity will allow us to dedicate [more] resources to reaching those with the most need and assisting them through what can be a long and confusing enrollment process.”

[NAME OF ORGANIZATION] is one of 87 Benefits Enrollment Centers (BECs) funded by NCOA to serve low-income Medicare beneficiaries in 43 states. BECs are supported with funding from the Medicare Improvements for Patients and Providers Act, administered through the U.S. Administration for Community Living.

BECs use NCOA’s free online BenefitsCheckUp® tool (www.BenefitsCheckUp.org) to screen lower income older adults, and younger adults with disabilities, for a number of benefits—including Medicare Savings Programs, Part D Extra Help, and the Supplemental Nutrition Assistance Program (SNAP)—and to help them apply for and use those benefits.

“We welcome people with Medicare, their caregivers, and family members to contact us for a comprehensive benefits screening,” added **[LAST NAME OF ORGANIZATIONAL REPRESENTATIVE]**.

People can find out if they qualify for assistance by calling **[ORGANIZATION PHONE #]** or visiting **[ORGANIZATION WEBSITE]**.

###

About **NAME OF ORGANIZATION**

Brief summary here with contact info.

Appendix E: Client Consent Form



National Council on Aging

Consent to Use Story, Quote, Photograph, or Recording

The undersigned subject of stories, quotes, photographs, recordings, film, or other personal biographical information (collectively “Materials”) hereby grants to the National Council on Aging, Inc., a nonprofit service and advocacy organization located in metropolitan Washington, DC, including its successors, sponsors, employees, distributors, licensees and assigns (collectively, the “Publisher”), the unrestricted permission, right and license to use the Materials and to reproduce, exhibit, broadcast, advertise and exploit all or any part of the Materials in any media chosen by the Publisher.

The undersigned consents to use of the Materials in any story, quote, photograph, recording or other media produced by or on behalf of the Publisher. The undersigned is aware that the Materials may be published by the Publisher in print or in electronic publications such as on the Publisher’s website(s) and may be released to news media and others in connection with the promotion or publicizing of the activities of the Publisher, including advocacy activities.

The undersigned grants permission to use his/her name or likeness and biographical data in connection with publication of the Materials, and/or the use of his/her personal story or quote under a pseudonym.

The Publisher shall own any copyright and all other intellectual property rights in the Materials. The undersigned waives any demand for compensation and waives any claim to any moral rights or any violation of rights to privacy, publicity or confidentiality under any statute or common law in connection with any use of the Materials.

The Publisher proposes to act in reliance on this Consent, therefore the undersigned declares it to be irrevocable, and releases the Publisher from any and all claims, liability, actions or demands whatsoever in connection with the use of the Materials as provided in this Consent.

Signed _____ * Date _____

Name (Please print) _____

Address _____ City _____ State _____ Zip _____

Phone _____ Email _____

*Must be signed by a parent or legal guardian in the case of a child under age 18 or legal guardian in the case of an adult (if applicable).

About NCOA

The National Council on Aging (NCOA) is a respected national leader and trusted partner to help people aged 60+ meet the challenges of aging. Our mission is to improve the lives of millions of older adults, especially those who are struggling. Through innovative community programs and services, online help, and advocacy, NCOA is partnering with nonprofit organizations, government, and business to improve the health and economic security of 10 million older adults by 2020. Learn more at ncoa.org and @NCOAging.