



Benefits Enrollment Best Practices

FAMILY ELDERCARE

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In 1982, Family Eldercare was founded by two women with a concern for supporting aging adults and adults with disabilities in Texas. They began by hosting public forums throughout the state to understand the needs of families and to direct them to resources that existed.

Family Eldercare was described as a group of fierce advocates with only a file cabinet, and over time would be called upon to create new services to meet the evolving needs of an aging population. The drive to meet the community's needs remains at Family Eldercare with our mission "to be the experts on the journey of aging by providing services tailored to the individual to promote independence and stability." Our vision for Texas is bold: "All Texans thrive with dignity and purpose in supportive communities and are financially secure." Today we push forward our mission and vision as a Benefits Enrollment Center (BEC).

Proposed Benefit Enrollment Center (BEC) Model

It was natural for Family Eldercare to become a BEC because we receive daily inquiries for benefits assistance—referrals from 2-1-1 Texas, the Aging and Disability Resource Center, and other service providers, as well as by way of our annual Summer Fan Drive. Two of our programs, Money Management and Service Coordination, already provide the core activities of BEC so were the launch point to implement this new model.

Money Management provides representative payee services using a case management approach, which keeps the most vulnerable members of our community stably housed and financially secure. They include people experiencing homelessness, and people with developmental disabilities, persistent mental illness, and/or substance use disorders. The need for this service is identified by a physician who determines that without intervention, the individual will not be able to meet their basic needs including shelter, food, clothing, and medical care. After that determination, the Social Security Administration will appoint a representative payee to receive and manage benefits on behalf of the client. Family Eldercare knows that giving up control of personal finances is a difficult position to be in, and that is why our staff are non-judgmental, compassionate, and person-centered in all our interactions.

Money Management supports clients with benefits enrollment because those programs are necessary to maintain a client's basic needs. In fact, 89% of Family Eldercare clients report that they are more financially stable because of our services, and 77% report an improvement in their quality of life. By taking a case management approach to being a representative payee, we are supporting our clients' total stability, which includes ongoing assessment to identify their strengths, challenges, and objectives. We have close ties with our clients in Money Management, many of whom we have served for more than 10 years. Our approach has proven to be the model for community-based representative payee services as noted by the Social

Security Administration which characterizes Family Eldercare as, “highly regarded in the area of [payee services].” More importantly, our Money Management clients tell us “Family Eldercare has changed my life.”

Service Coordination addresses the issues of poverty, social isolation and loneliness, and the need for resources for low-income older adults and adults with disabilities. It is a profession linked to affordable housing and the program design is guided by the U.S. Department of Housing and Urban Development.

Our Service Coordination team is on-site at 12 properties throughout Austin, TX, and residents find us to be an integral part of their community. Our primary responsibility is to respond to the gerontological- and disability-related needs of residents. We connect them with community resources which will support their aging in place; we survey the community and develop our own wellness programming; we mediate between neighbors and property management; we assist with the enrollment of public benefits. As with Money Management, having close ties with the people we serve is fundamental, and for Service Coordination this means having a dedicated office that residents have easy access to. Likewise, Service Coordinators can easily visit residents in their apartment homes. Our daily presence fosters a community building environment. We gain the trust of residents and may find out that there is not enough food to last the entire month, or that despite living in affordable housing they still must choose between prescriptions or paying the rent in-full, on-time. From those candid moments, we are educating and assisting residents with life-saving benefits, and through word-of-mouth the whole apartment community knows Family Eldercare as the people who help. This relationship-based model works as 85% of residents report that they received help to find or keep resources to meet their basic needs. Our presence across the community, especially by way of our Service Coordination team, makes for easy outreach and messaging about our assistance.

Challenges and Best Practices

Home is the Center of Benefits Enrollment

The nature of Money Management and Service Coordination requires a significant number of face-to-face visits with clients. At the same time, mobility is often the greatest challenge our clients face to accessing supports, services, and even public benefits.

Rather than expecting clients to travel far distances across the city, usually by public transit, Family Eldercare goes to them. Our Service Coordination team is on-site where our clients live and our Money Management services are designed to be provided in the home because that is where we often learn if people’s basic needs are truly being met. Other practical reasons for

delivering BEC activities in the home include less likelihood of a participant forgetting a required document and identifying if other home-based services are needed. Family Eldercare believes to the greatest extent possible, social service delivery should occur nearest to, or in the participant's home.

- The outcomes of services and the rapport among participants will improve if you visit them at home.
- The “we’ll meet you where you’re most comfortable” spirit is conducive for engaging hard-to-reach populations such as people experiencing homelessness who also are most in need of benefits enrollment assistance.
- It is important to build the true costs of staff travel time and mileage into your budget and equip your staff with the tools to successfully mobilize (i.e., hardware, software and connectivity).
- To support benefits enrollment assistance, adapt or implement the Service Coordination model in your community’s affordable housing or in apartment communities where there are a large number of older adults, families with disabilities, or people living on low incomes, learn more from the American Association of Service Coordinators by visiting www.servicecoordinator.org.

“Fans and Food”

For 30 years, Family Eldercare has hosted the annual Summer Fan Drive for Central Texas. It is a community health initiative that delivers free fans to people who must survive Texas summers without air conditioning, because they cannot afford it or otherwise do not have it (per the Texas Property Code, air conditioning is not a basic habitability requirement). This is a grave issue as the leading cause of weather-related death is heat.

The community knows Family Eldercare best from the Fan Drive as we receive most of our media coverage during this time and it is our largest annual fundraiser. Immediately upon becoming a BEC, we strategized how we could incorporate the two programs as there was potential for synergistic impact. It was the idea for a three-day event where people could receive a free fan and also receive assistance for a SNAP application— “Fans and Food” – that stood out. We would be able to leverage thousands of dollars of in-kind advertising from local networks to get the word out about the BEC and hopefully reach those 42% of income-eligible residents in Travis County not enrolled in the SNAP program. We all know how our lives have

been disrupted in the time since COVID-19, but the concept stands and there are key takeaways for organizations to consider:

- The synergistic effect—what is another program or event your organization delivers that can be augmented with BEC activities?
- Cement your brand as a BEC by leveraging your organization’s peak community coverage during the year, likely to be your annual fundraiser.
- Plan early, collaboratively, and thoroughly.

Brag About Your Transformational Impact and Let It Transform You

In writing this best practices report, Family Eldercare was reminded of an article in the Summer 2014 issue of the *Generations* Journal of the American Society on Aging titled, “Nine Strategies to Transform Community Service Organizations That Assist Older Adults.” In it the National Council on Aging (NCOA) writes:

“Defining an organization in terms of the services it currently provides is a strategic mistake because it limits opportunities for social impact and new revenues. Instead, community service organizations should define themselves in terms of the outcomes they want to produce for their target population.”

Before becoming a BEC, Family Eldercare was stuck in describing ourselves in terms of the services we provide, even benefits enrollment assistance. NCOA acknowledges there is “undeniable value” in talking about services, but that alone will not be enough in an ever-competitive landscape of fundraising among nonprofits. When the numbers came back that our total assistance was valued at \$355,423 there was a shift in our marketing to key stakeholders and the community. Since then, the total value has grown exponentially—to \$3,156,998! —and there is not a funding proposal or fundraiser in which we do not emphasize this impact.

Moreover, thanks to the data tools offered by the BEC, we have taken inventory of our infrastructure, and like our messaging, it too needed updating. Becoming a BEC pushed our organization to invest in new data systems that enable us to be outcomes- driven and clear in our purpose.

Partner with Benefits Administering Agencies

The Travis County Community Center at Oak Hill is the administering agency for the Low-Income Home Energy Assistance Program (LIHEAP, known locally as CEAP), one of the five core benefits. Every year representatives come to the Family Eldercare office to provide our staff with a tutorial and a checklist of what is necessary for a successful and complete benefit application. It is such an anticipated and well-attended session that everyone among Travis County at Oak Hill and Family Eldercare is on a first name basis. It is a space to learn more about the benefits of the program, to establish a referral network, to workshop specific application scenarios, how best to communicate with energy providers, and overall to have a better understanding of the important work of each agency. This all came about because someone had the obvious idea that for such a detailed benefit application it would be helpful to have a presentation from the administering agency. Years later, it is a long-standing tradition that BECs should replicate.

Client Stories

Money Management Client: A client with a traumatic brain injury who now receives representative payee services received benefits enrollment assistance. This assistance helps to keep the client organized with recertifications; in addition, the client's representative payee case manager realized a mistake on the part of the benefits administering agency which caused the reduction of one benefit by \$100. The case manager was able to successfully appeal for a reinstatement of that benefit, a right that the client previously was not aware of.

Service Coordination Client: One BEC counselor notes: "I had the pleasure of serving residents at Community First Village with benefits renewal and first-time applications for SNAP benefits. I have a male resident who is 58 years old with limited mobility to walk. So, I went to his home to assist him with the application. He stated, 'God bless you for being willing to come to my home to assist with renewal of my SNAP benefits.' He had a big smile on his face, and I was so excited that I was able to help.