

# Benefits Enrollment Center (BEC) Grants:

Informational Call for Prospective  
Applicants

Center for Benefits Access

May 6, 2021



# Agenda

1. Intro to National Council on Aging (NCOA)

---

2. Overview of the Benefit Enrollment Center (BEC) Program

---

3. BEC Experience

---

4. 2021 Grant Overview and Timeline

---

5. Grant RFP Process

# Who we are

---

## Vision

A just and caring society in which each of us, as we age, lives with dignity, purpose, and security

---

## Mission

Improve the lives of millions of older adults, especially those who are struggling

---

## Goal

Impact the health and economic security of 40 million older adults by 2030, especially women, people of color, LGBTQ+, low-income, and rural individuals

# The work we do

---

## Resources



Trusted, unbiased information that enable older adults and their caregivers to take small steps that can have a big impact on their health and financial security

---

## Tools



Personalized, online support for individuals to find benefits, choose a Medicare plan, prevent falls, and plan for a healthy and secure life

---

## Best Practices



Technical assistance and support for professionals in community-based organizations who serve older adults every day

---

## Advocacy



A national platform and voice to fight against ageism—and to strengthen the federal programs we all depend on as we age

# Center for Benefits Access

- Provides tools and resources that help local, state, and regional organizations to find, counsel, and assist clients to apply for and enroll in the benefits for which they may be eligible.
- Generates and disseminates new knowledge about best practices and cost-effective strategies for benefits outreach and enrollment.

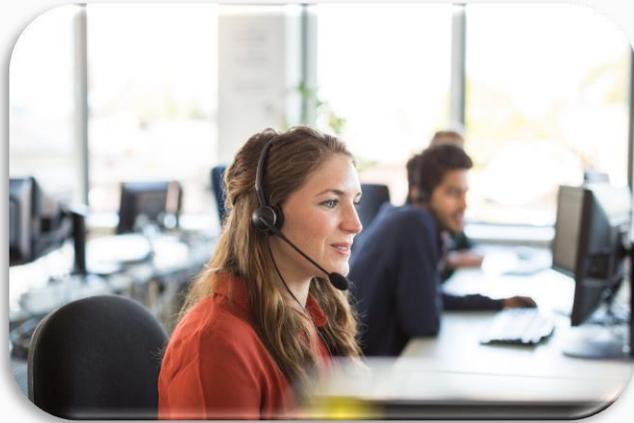
# Benefit Enrollment Centers (BECs)

**BECs use person-centered strategies in a coordinated, community-wide system to find and enroll Medicare beneficiaries in core benefits.**

- Complete applications on behalf of eligible clients.
- Assist with application troubleshooting and follow-up.



# The BEC Model



**Call Centers**



**Brick and Mortar or out-stationing counselors at local sites**



**Programs within a community organization**

Most serve specific targeted cities/regions of their state; a few are statewide.

# Core Benefits

## Provide screening and enrollment assistance:

- Medicare Part D Extra Help/Low Income Subsidy (LIS)
- Medicare Savings Program (MSPs)
- Medicaid
- Supplemental Nutrition Assistance Program (SNAP)
- Low-Income Home Energy Assistance Program (LIHEAP)

# Common Additional Benefits

## Learn More About Benefits

Learn more about the programs that can help you save money.



Medications



Health Care



Income Assistance



Food & Nutrition



Housing & Utilities



Tax Relief



Veteran



Employment



And More

### And More

Don't miss out on other benefit programs such as: **counseling assistance** that can help you better understand your health insurance coverage, **information and referral** services if you have hearing or vision loss, **respite care** services for caretakers, **pension assistance**, parks and recreational **discounts**, education programs, **transportation** assistance, and other services.

[Find My Benefits](#)

### Examples of Other Types of Programs

- State Health Insurance Assistance Program (SHIP)
- Family Caregiver Support and Respite Care Services
- Long-Term Care Ombudsman
- Legal Services and Assistance Programs
- Interpreter Referral Services
- PensionHelp America
- Free Public Transit and Reduced Fare Programs

# **BEC Program Design**





## **Enrollment and Retention is the Goal**

The central goal of BECs is increasing the number of individuals enrolled in public benefits and helping those enrolled retain benefits.



## Person-Centered Approach

Focus on the individual's needs and circumstances, rather than focusing on enrolling them in a benefit program.

Reduce burden and duplication of effort required of an individual seeking assistance.

# Follow-Up with Individuals Assisted

- Conduct follow-up conversations to ensure that benefits are received.
  - Serve as liaison between individual and local government agency to resolve delays or address denials.
  - Opportunity to learn if there is other assistance or education that the individual needs.
  - Help with recertification, when necessary.



# Coordinated Community Systems

- Developing Partnerships
  - Choose the partners and strategies that are best suited to your community.
  - Review the resources at [www.centerforbenefits.org](http://www.centerforbenefits.org) for promising practices.
  - All proposals must include letters of commitment from intended partners that express the specific role they will play in implementing the proposal.

# Current Funding Opportunities

New Benefit Enrollment Centers &  
Sustainability Funding for Existing  
Centers



# Grant Overview

## New Benefit Enrollment Center

- Grant Award up to \$100,000 to implement a new Benefit Enrollment Center program
- The program will run 12 months October 1, 2021-September 30, 2022

# Sustainability Grant Overview

## Current Benefit Enrollment Centers

- Grant Award up to \$120,000 to continue an existing Benefit Enrollment Center program
- The program will run 24 months October 1, 2021-September 30, 2023

# Who is Eligible for These Grants?

- Public or nonprofit providers of services to seniors or adults with disabilities.
- Faith-based organizations and coalitions.
- Tribal organizations.
- State and local government agencies serving older adults or adults with disabilities.
- Consumer advocacy organizations or coalitions.



# Contents of a Complete Proposal

- Implementation plan for outreach and enrollment activities
- Budget and budget narrative
- Age + Action Conference
  - **New:** Financial Supporters toward BEC Program
- Electronic letters of commitment from community partners
  - Partners should explain the role they will play in the BEC.

# Selecting Your Goal

- Each applicant will provide a suggested goal
  - 350 Minimum for New Grantees
  - Sustainability Grantees: NCOA will email your individual goal.

Resources to guide your goal setting:

[Low-Income Older Adults Map](#)

# Electronic Letters of Commitment

- **Applicant must fill out in notice of intent form.**
- **Email request will be sent to maximum of 5 recipients.**
- **Recipients must fill out separate form and submit letters of commitment by July 1, 2021.**

Please complete this form to solicit Letters of Support from any external organization whose support is critical in reaching your goals.

Please complete all required fields.

You can save as a draft and return later to complete by clicking "Save Draft" at the bottom of the page.

When you are ready to submit this step, please click the blue "Save" button at the bottom of the page.

Your Organization's Name

Supporting Organization Name \*

Supporting Organization Email \*

Optional Note to Supporting Organization

# Expectations of Funded BEC Program

- Commitment to assist people with filing all benefits applications for which they are eligible.
- Proven access and credibility with the target population in the target area.
- Commitment to using [BenefitsCheckUp.org](https://www.BenefitsCheckUp.org).
- Commitment to provide monthly reporting data online.
- Plan for sustaining the work after the funding ends.

# Scoring the Proposal

**Each Applicant will be scored to a total of 100 points**

- Statement of Need [10 points]
- Target Area and Populations [15 points]
- Plan Objectives and Work Plan [15 points]
- Description of Approach [35 points]
- Management and Organizational Capacity [15 points]
- Budget [10 points]



***NCOA reserves the right to approve grantees based on a composite of factors, including review of most recent Audited Financials or 990 Tax Form.***

# Statement of Need



Why does your community need a Benefits Enrollment Center?

# Target Area and Populations



- Rural older adults
- Border community
- Immigrants
- African Americans
- Asian Americans
- Hispanic/Latinos
- Tribal communities residing on and off reservation land
- People with disabilities
- Members of the LGBTQ community
- Those with limited English proficiency (LEP)
- Women
- Veterans

# Plan Objectives and Work Plan

<b>Goal: Conduct outreach to at least 5,000 Medicare beneficiaries.</b>					
<b>Key Action Step(s)</b>	<b>Timeline</b>	<b>Expected Outcome(s)</b>	<b>Measurement(s)</b>	<b>Person / Area Responsible(s)</b>	<b>Comment(s)</b>
1. Create outreach plan	Jan – Feb 2022	5,000 Medicare beneficiaries will be educated on the core benefits and will have the opportunity to work with a counselor to apply for benefits if they'd like.	a. # of outreach activities (e.g., events held in a variety of settings: senior centers, libraries, pharmacies, etc.; mailings; or outbound calls) to educate individuals about any of the core benefits for which they may qualify, eligibility criteria for the benefits, the availability of online screening and enrollment tools, and how to apply for benefits  2. # of individuals reached through outreach activities	1. Project Director 2. Communications Manager 3. Outreach Coordinator 4. Volunteers	
2. Train outreach staff on the BEC project	March 2022				
3. Conduct 2 outreach events per month	March – September 2022				
4. Evaluate outreach plan and implement necessary changes	Quarterly				

# Description of Approach



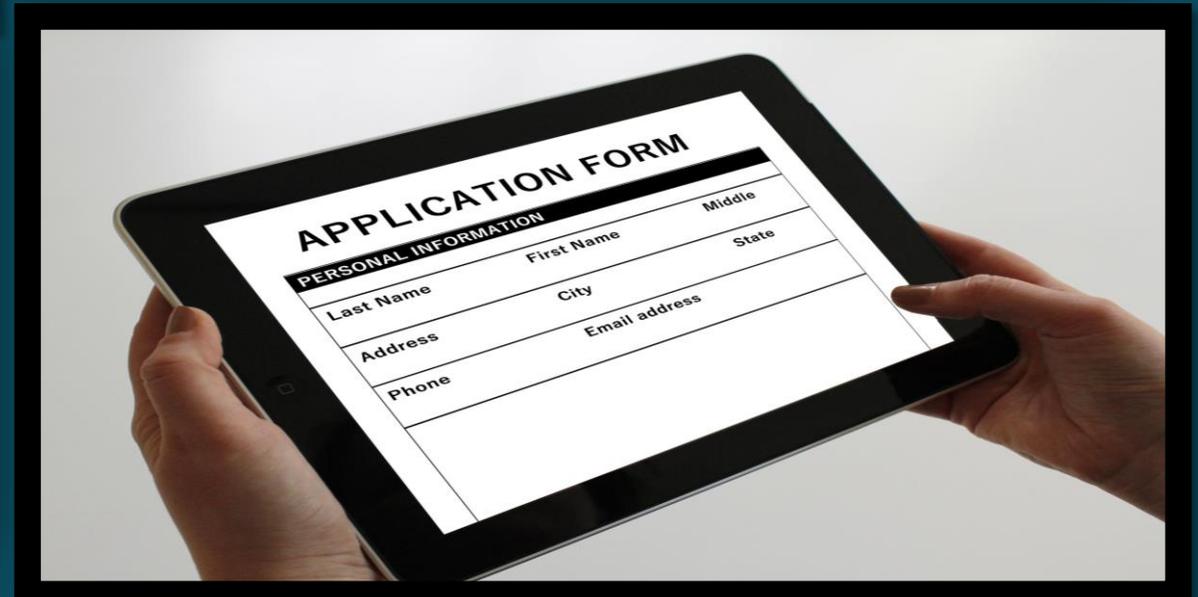
**ncoa** | BenefitsCheckUp  
national council on aging

Click to [find help](#) if you've been affected by a natural disaster.

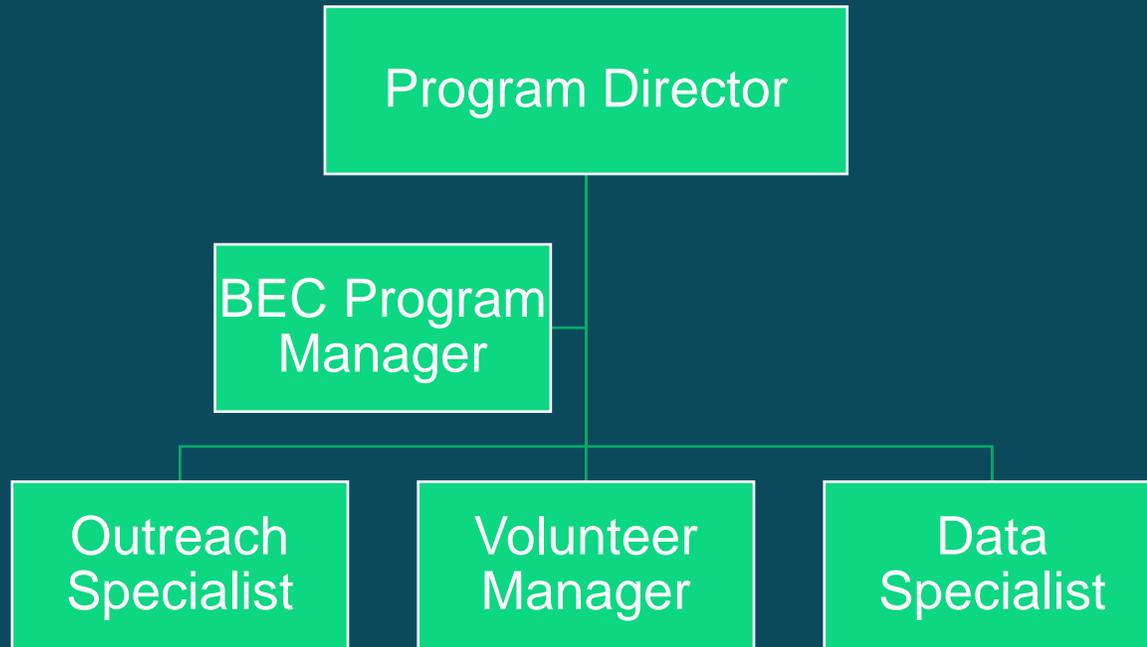
[Home](#) [Find My Benefits](#) [About Us](#) [Sponsors](#) [Resources Near Me](#) [English](#) [Spanish](#)

## Explore Benefit Programs in Your Area

Enter ZIP Code to Browse



# Management and Organizational Capacity



# Budget

	CATEGORIES	BUDGET	
	<b>PERSONNEL</b>		
1	DIRECT LABOR		
2	FRINGE BENEFITS		
3	<b>PERSONNEL TOTAL</b>		
	<b>OTHER DIRECT COSTS</b>		
4	TRAVEL		
5	PRINTING/DUPLICATION		
6	SUPPLIES		
7	TELEPHONE		
8	POSTAGE		
9	ADVERTISING		
10	EQUIPMENT		
11	CONSULTANTS/SUBCONTRACTORS		
12	OTHER		
13	<b>OTHER DIRECT TOTAL</b>		
14	<b>INDIRECT COSTS*</b>		
15	<b>GRAND TOTAL</b>		

\*If requesting indirect costs, use of funds must adhere to federal indirect cost guidelines. For details, review the HHS Grants Policy statement (<https://www.hhs.gov/sites/default/files/grants/grants/policies-regulations/hhsgps107.pdf>).

# Proposal Application Timeline

- Notice of Intent must be submitted to access application.
- Applications are due electronically by **12:00 PM ET** on **Thursday, July 1, 2021**.
- All completed applications will be evaluated by a panel of national experts.
- Interviews with finalists will be held **July - August 2021**.
- Successful applicants will be notified on **September 1**.

# Further Resources

Visit <https://ncoa.org/professionals/benefits/center-for-benefits-access> for additional information on BECs, including:

- [Meet the BECs](#)
- [BEC Readiness Assessment](#)
- [BEC Toolkit](#)
- [Webinars](#)



# Frequently Asked Questions

**NCOA will host a  
Q&A session on  
June 3, 2021 at  
2pm EST**

# Contact Information

For any questions, please  
email [becproposals@ncoa.org](mailto:becproposals@ncoa.org)



A person wearing a blue suit jacket and a white shirt is holding a white rectangular sign with both hands. The sign has the word "QUESTIONS?" written on it in a bold, dark blue, sans-serif font. The person's hands are positioned at the bottom corners of the sign, and their fingers are slightly curled. The background is a plain, light-colored wall.

**QUESTIONS?**



# Age+Action

**2021 Virtual Conference**

**June 7—June 10**