Benefits Enrollment Center (BEC) Grants:

Informational Call for Prospective Applicants

Center for Benefits Access
May 6, 2021
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

<table>
<thead>
<tr>
<th>Vision</th>
<th>A just and caring society in which each of us, as we age, lives with dignity, purpose, and security</th>
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<tbody>
<tr>
<td>Mission</td>
<td>Improve the lives of millions of older adults, especially those who are struggling</td>
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<tr>
<td>Goal</td>
<td>Impact the health and economic security of 40 million older adults by 2030, especially women, people of color, LGBTQ+, low-income, and rural individuals</td>
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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

Best Practices

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

Tools

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

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.
81 BECs across 40 States
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.

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.

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.
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 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.
• 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

<table>
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<tr>
<th>Key Action Step(s)</th>
<th>Timeline</th>
<th>Expected Outcome(s)</th>
<th>Measurement(s)</th>
<th>Person / Area Responsible(s)</th>
<th>Comment(s)</th>
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| 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 | 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 | | | | |

**Goal:** Conduct outreach to at least 5,000 Medicare beneficiaries.
Description of Approach

Outreach

Explore Benefit Programs in Your Area
Enter ZIP Code to Browse

Don’t Forget to Follow Up

Application Form

PERSONAL INFORMATION

Last Name  City
First Name  State
Middle  Address
Email
Phone

Click to find help if you’ve been affected by a natural disaster.
Management and Organizational Capacity

- Program Director
- BEC Program Manager
- Outreach Specialist
- Volunteer Manager
- Data Specialist
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<th>CATEGORIES</th>
<th>BUDGET</th>
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<tr>
<td>PERSONNEL</td>
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<tr>
<td>1 DIRECT LABOR</td>
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<tr>
<td>2 FRINGE BENEFITS</td>
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<td>3 PERSONNEL TOTAL</td>
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<tr>
<td>OTHER DIRECT COSTS</td>
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<td>4 TRAVEL</td>
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<td>5 PRINTING/DUPLICATION</td>
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<td>6 SUPPLIES</td>
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<td>7 TELEPHONE</td>
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<td>8 POSTAGE</td>
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<td>9 ADVERTISING</td>
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<td>10 EQUIPMENT</td>
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<td>11 CONSULTANTS/SUBCONTRACTORS</td>
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<td>12 OTHER</td>
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<tr>
<td>13 OTHER DIRECT TOTAL</td>
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<tr>
<td>14 INDIRECT COSTS*</td>
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<td>15 GRAND TOTAL</td>
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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
Age + Action 2021 Virtual Conference
June 7—June 10