



Benefits Outreach Toolkit: Guide to Using Telephone Town Halls

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Guide to Using Telephone Town Halls

If your organization is interested in using telephone town halls to reach people potentially eligible for benefits, here's what you need to have ready.

Must Have



- At least two staff members available to help during the live call (moderator and expert)
- Computer & landline phone for all participating members
- Financial resources to pay a vendor to manage the call and purchase the call-out list (specifics below)
- Staff time to handle timely call-backs to leads in the days following the town hall, and to manage application process and intake (you should plan to receive anywhere between 300-400 leads or more, depending on the size of your call-out list)

Nice to Have



- A beneficiary to speak on the call/record remarks about their experience working with your organization
- Local celebrity/guest speaker to speak on the call/record remarks about why it's important to access benefits

Cost/Resource Implications



While costs for telephone town halls can vary widely depending on the scope, here is a sample price range for a call which includes a relatively large data (i.e., phone list) purchase:

- **Set-up & call management:** \$3,500 - \$4,500
- **Data purchase:** \$600 - \$800 (approximately 15,000 – 20,000 names)
- **Screeners/additional needs:** \$25 per screener (estimate hiring 3-4 per call)
 - **Estimated total cost:** \$4,200 - \$5,400

You should also budget **10-15 hours of staff time**, and plan to begin preparing for the call 10-15 days in advance, to allow adequate time to line up guests, approve scripts, record messages, etc.

Strategy Overview

Telephone 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. By working with a vendor to manage the process, purchase data (more on this process below), and track outcomes from the call, you'll be able to identify those participants who are most likely to be interested in benefits, so you can follow up with them post-call. Telephone town halls are an excellent option to reach older adults, since this strategy is limited to only those households with landlines, which tends to skew toward an older demographic.

Working with a Vendor

When you decide to do a telephone town hall you'll need to pick a vendor who can conduct the outbound calling and take care of the back-end logistics. Examples of vendors include: [Stones' Phones](#), [iConstituent](#), and [Shoutpoint](#). After you contact them, the vendor will typically offer to participate in a 30-minute informational call to answer questions, tell you about their process, and outline their prices. You can request an informational call with several different vendors to help you make an informed selection.

Data Purchasing/List Targeting

Part of the fee incurred by the vendor will go towards the purchase of data, in this case, a call-out list of people that you'd like to participate in the town hall. All data is pulled from publicly available rolls of registered voters, and the vendor can tailor the list to your specifications. For example, if the goal is to reach people over 65 years old in specific counties or zip codes, the vendor can find you a list that fits that demographic. They can also eliminate anyone from the list who has requested to not receive robo-calls.

Scheduling the Town Hall

The town hall will take place at a predetermined date and time that you select. We recommend a late morning/early afternoon time (between 11 am – 1 pm) when potential participants are likely to be at home. Don't hold your call on a Monday or Friday, as this will make the pre-call and follow-up process difficult.

The day before the event, the vendor will initiate a robo-call to a list of potential participants. If they answer the phone, they'll hear a pre-recorded message letting them know when the call is happening, and to expect another call the following day around that time. The day of the event, the vendor will call out again at the appointed time; if a potential participant answers the phone, they will automatically be connected to the town hall. If they don't answer, they will

receive an answering machine message with your contact information, in case they want to learn more about benefits programs. Examples of these robo-call scripts are included in the Appendix.

Preparing for the Town Hall

Establishing Roles

- The call requires at least one **moderator** who will guide participants through the call and keep the conversation on track. The moderator will be speaking throughout the duration of the call – he/she will begin the call, introduce all the guests and people on the call, read the poll questions and answers, conduct all transitions, and close out the call. We recommend asking a leader from your organization, such as an executive director, to fill this role.
- A **storyteller/beneficiary** who received help from your organization and can share their personal experience can also be a great asset to the call. Anyone who benefited from your help can fill this role, but we recommend someone with an especially powerful story - maybe they were going without food or heating because they couldn't afford to pay their bills, their medications, and other necessities. The guest can choose to speak live on the call or pre-record their remarks. If they are not comfortable using their real name you can change their name/other details for the call.
- A **guest speaker** is also recommended and can entice people to join the call. This person could be a local celebrity or advocate in the community who can speak about the importance of ensuring older adults with fixed incomes access benefits. The moderator will introduce this person and give them 1-2 minutes to speak. Like the storyteller/beneficiary, this person can participate live or pre-record their remarks to be played during the call.
- We also recommend **one other expert** or representative from your organization who can help answer questions about benefits programs and engage in a scripted dialogue with the moderator. This helps with the flow of the call, to ensure that it sounds natural and engaging.



Developing Materials

- There are several materials you will need to develop ahead of the call. Samples of each of these materials can be found in the Appendix:
 - **Pre-call, live-answer, and day-of phone messages:** As described above, the pre-call goes out the day before the town hall alerting all people on the list that a town hall will be conducted the following day. This allows them to plan for it and helps avoid people hanging up for the real call. The live-answer message is what is played when people answer the phone and are connected to the town hall. And the day-of phone message is the message left on anyone's voicemail who does not answer their phone. You may choose to have a staff member record these messages for you, or the vendor can do the recording, if that's preferable.
 - **The "Run of Show," or call agenda:** This fleshes out every piece of the telephone town hall from beginning to end, including all scripted remarks from the moderator, guest speaker, and beneficiary (if applicable).
 - While not essential, **poll questions** during the town hall are a way to engage listeners, who can easily respond by pressing numbers on their telephone keypad. These questions should be decided in advance and the poll should be administered by the vendor. The goal of polling participants during the call is two-fold: it helps keep them engaged during the call, and helps you learn more about them. Following the call, you'll receive a record of everyone who participated in the poll; you may wish to prioritize following up with these people, since they were among the more "active" members on the call, which indicates that they are very interested in benefits programs.

Note

A quick note about **Q&A**: Based on experience, a live Q&A on the town hall can be challenging, as listeners' questions tend to be fairly personal/specific to that person's situation. In order to ensure that the Q&A is as effective as possible and covers topic areas relevant to everyone, it is recommended to plant questions in your script to use throughout the call, rather than patching through callers' live questions. Although you won't be responding to any listener questions live on the call itself, you should still prompt listeners to press "0" to ask a question. This helps keep them engaged throughout and helps keep track of who asked a question, so you can prioritize following up with them after the call. When a participant presses "0" to ask a question, they'll be patched through to a volunteer who will record their question, so that they feel heard, and so that you can better understand their needs when you follow up with them post-call.

- **Screener script:** This is a script for the call screeners, who will be taking down basic information from callers who press “7” during the call to indicate that they want to learn more about benefits programs. The screeners essentially “pre-screen” these participants, so that when you’re ready to follow up, you already have a good sense of what kind of help they’re looking for. Like the call participants who press “0” to ask a question, or who answer the poll questions, you’ll want to prioritize follow-up to people who press “7” for a pre-screening, since they’ve indicated that they are very interested in the services you have to offer (more on follow-up prioritization is below). In terms of staffing, you should ask the vendor to provide 3-4 screeners per call. They are very affordable (about \$25 per screener) and the more you have, the quicker you’ll be able to get through the queue.

Moderator Training

- The telephone town hall vendor will conduct a training for the moderator to get a feel for the flow of the event. The vendor will also likely provide access to a back-end computer interface where the call will be controlled behind the scenes. This will allow you to see the poll results and how many people are on the call at any given time. The interface also includes a private group “chat” so you/your staff can communicate with the call operator throughout the town hall. During the training, the vendor will run through the features of the interface and make sure the moderator and other participating staff feel comfortable with it.

Run-Through Call

- A quick practice call will be conducted 20 minutes before the live telephone town hall in which participants will simulate the full process. It should take no more than 10 minutes. In addition to ensuring everyone’s interface works, it will also help test microphones, ensure everyone is comfortable and can hear each other, and that all technology is working. During the run-through call, it’s a good idea to remind everyone speaking live to speak slowly and clearly.
 - One other important note about phones: Please ensure that all live participants are calling in from a landline to help avoid the dropped calls/spotty reception that can occur on cell phones! This also applies to pre-recorded messages.

After the Telephone Town Hall

Analyzing your Data

- Your vendor will provide the names, phone numbers, and addresses of those who participated in the town hall – this includes everyone who connected, even if just for a few seconds. You will see specific data for each caller, including whether they participated in poll questions, pressed a button to ask a question or to get pre-screened, the outcome of that pre-screening conversation, etc. We recommend separating these people into two tiers to help prioritize follow-up:
 - Tier 1 leads = anyone who pressed a button to ask a question or connect with someone to get help. We recommend you prioritize follow-up with this group.
 - Tier 2 leads = anyone who answered poll questions or stayed on the line longer than 7-10 minutes.

Following up with Participants

Once you have the names of your leads, conduct follow-up via phone as soon as possible, so that the town hall is still fresh in people's minds. You may wish to arrange in-person meetings as necessary.



In some cases participants – even those who were pre-screened – may not remember the call or be skeptical or suspicious about why you're reaching out to them. In these cases, we recommend following up via snail mail or email, providing information about your organization and your phone number and address in case they want to reach out or come in for a screening. This can help put people at ease and see that you are who you say you are!

Benchmarks

While outcomes will vary based on the scope of your call, here are some target benchmarks to shoot for if your town hall is similar in scope to that listed above:

- **Tier 1 Leads:** 180
- **Tier 2 Leads:** 230
- **Total People Reached:** 3,000
- **Total Applications:** >30

Appendix A: Sample Pre-Call, Live-Answer, and Day-Of Phone Messages

Pre-Call

Hi, it's [FIRST NAME] with Elder Law of Michigan, a nonprofit organization working to improve the lives of older Michiganders. If you're currently living on a fixed income, there might be benefit programs you're eligible for that can help you make ends meet – even as the cost of living keeps going up. We'd like to invite you to join us for a live Telephone Town Hall tomorrow at 1 pm where we'll be discussing these benefit programs and answering questions live! It's free to participate, so just answer the phone when we call tomorrow around 1 pm to join the conversation. Thanks for your time! Funded by the National Council on Aging, a national nonprofit that has been helping seniors since 1950. 571-527-3900.

Day-of Live Answer

Hi, it's [FIRST NAME] with Elder Law of Michigan, a nonprofit organization working to improve the lives of older Michiganders. I'd like to invite you to a live Telephone Town Hall right now to discuss benefit programs that could help you make ends meet while living on a fixed income. We'll also be answering questions live! It's free to participate, so just stay on the line to join the conversation. Thanks for your time! Funded by the National Council on Aging, a national nonprofit that has been helping seniors since 1950. 571-527-3900.

Day-of Answering Machine

Hi, it's [FIRST NAME] with Elder Law of Michigan, a nonprofit organization working to improve the lives of older Michiganders. I'm sorry I missed you. I wanted to invite you to a live Telephone Town Hall to discuss benefit programs that could help you make ends meet while living on a fixed income. For more information, please visit www.elderlawofmi.org or call 866-400-9164. Thanks for your time! Funded by the National Council on Aging, a national nonprofit that has been helping seniors since 1950. 571-527-3900.

Appendix B: Sample “Run of Show” (including poll questions and sample Q&A question plants)

Legal Aid of the Bluegrass: Telephone Town Hall Run of Show, Tuesday, May 9 | 12 pm ET

- I. Opening remarks from **JOSH** (Moderator) (1-2 min.)
 - a. Good afternoon and welcome to today’s Legal Aid of the Bluegrass telephone town hall. My name is Josh Crabtree. I’m the Executive Director of Legal Aid of the Bluegrass, a nonprofit organization, and I will be the moderator for today’s event. During this call, we’ll be discussing benefit programs that could help you make ends meet while living on a fixed income. We’re excited to have you join us. We’ll begin in just a moment, but before we do, a few quick notes. Right now, we are in the process of dialing out to thousands of people, so stay on the line and we’ll be hearing from our speakers very soon. As I said, we will be discussing benefit programs that could help you make ends meet while living on a fixed income. Programs like Medicare Extra Help, a Social Security benefit that helps you pay for prescriptions, and benefits that could help you pay for groceries. If you would like more information about these benefit programs, press **SEVEN** on your telephone keypad, and you’ll be connected directly with one of our volunteer operators. Again, press **SEVEN** if you are interested in learning more about benefit programs that could help you make ends meet while living on a fixed income.
 - b. **[JOSH REPEATS]** If you have just joined us, good afternoon and welcome to today’s Telephone Town Hall with Legal Aid of the Bluegrass. My name is Josh Crabtree. I’m the Executive Director of Legal Aid of the Bluegrass, a nonprofit organization, and I will be the moderator for today’s event. We’re excited to have you join us. We’ll begin in just a moment, but before we do, a few quick notes. Right now, we are in the process of dialing out to thousands of people, so just stay on the line and we’ll be hearing from our speakers very soon. We will be discussing benefit programs that could help you make ends meet while living on a fixed income. Programs like Medicare Extra Help, a Social Security benefit that helps you pay for prescriptions, and benefits that could help you pay for groceries. If you would like more information about these programs, press **SEVEN** on your telephone keypad, and you’ll be connected directly with one of our volunteer operators. Again, press **SEVEN** if you are interested in learning more about benefit programs that could help you make ends meet while living on a fixed income.

- c. Now I'd like to tell you a little bit more about Legal Aid of the Bluegrass's work, the services we provide, and the types of benefit programs we connect older Kentuckians with every day.

II. Remarks from **JOSH** (3 min)

Legal Aid of the Bluegrass is a nonprofit that provides services throughout 33 counties in northern and central Kentucky. We provide services like no-cost legal assistance in a variety of cases, such as the preparation of life planning documents to seniors. We also have a group of people that help individuals understand their Medicare benefits and advocate on their behalf when they have billing or coverage problems. We also do a lot of work on what we're talking about today - connecting people like yourself with benefits you may be eligible for, but are not yet receiving. At Legal Aid, we protect families, ensure fairness and change the lives of each person we reach.

There are five benefit programs we want you to know about today:

- SNAP – or food stamps – which can help you buy healthy foods.
- The Medicare Savings Program which helps pay your Medicare Part B premium
- Medicare Part D Extra Help, which pays your Part D monthly premium and some prescription co-payments
- Medicaid, which you may know is a low-income health insurance program for people who couldn't otherwise afford coverage; and
The Low-Income Heating Assistance Program – often called LIHEAP – which can help cover the cost of your heating bills.

III. **JOSH:** Now we'd like to ask you our first Poll Question. This will help us learn a bit more about you, so that we are better able to assist you. Here is our first question: **Are you currently enrolled in any benefit programs?**

- a) Press 1 for **Yes**
- b) Press 2 for **No**
- c) Press 3 for **Unsure**

[**JOSH** repeats above]

IV. **JOSH** introduces "guest speaker" Harold.

- Now we'd like to share a recorded message from one of our recent clients, Harold.

V. **HAROLD's** recorded story is played (2-3 min)

- VI. **JOSH** shares results from Poll Question #1 (30 sec.)
- Thank you, Harold! Before we open it up to questions from the audience, here are the results from our first poll question **[Add results]**
- VII. **JOSH** opens up the Q&A
- Now we are going to answer some of your questions. If you'd like to ask a question, press **ZERO** on your keypad now. Again, press **ZERO** on your keypad if you'd like to ask a question.
- VIII. **JOSH** begins with first planted question (30 sec.)
Our first question comes from John in Danville, who asks: Are there programs that can help me save on my Medicare costs?
- IX. **JOSH:** My colleague Angela is here to help answer your questions. Angela, can you tell John about what programs are available to help save on Medicare costs?
- X. **ANGELA** answers question (1 min)
- There are three benefit programs that can assist with Medicare costs. The first is the Medicare Savings Program. This benefit covers up to your entire monthly premium for Medicare Part B. That's a little more than \$100. Another is Medicare Part D Extra Help. This benefit can pay up to your entire monthly premium for a Medicare Part D Prescription Drug Plan. You do not have to be enrolled in a plan to apply for this benefit, however you do have to be eligible for Medicare. The last of the three is Medicaid. Medicaid covers both Part B premiums as well as prescription drug costs, and provides additional medical coverage.
- XI. **JOSH:** Now we'd like to ask our second poll question. Again, this will help us learn a bit more about you, so that we are better able to assist you. Here is our second question:
Which benefit program are you most interested in learning more about?
- a) **Press 1** for SNAP (the food assistance program)
 - b) **Press 2** Medicare Savings Program (which helps cover your Part B premium)
 - c) **Press 3** Medicare Part D Extra Help (which helps with prescription costs)
 - d) **Press 4** for Medicaid (low-income medical insurance)
 - e) **Press 5** for The Low Income Heating Assistance Program

[**JOSH** repeats above]

- XII. **JOSH:** Again, if you'd like to ask a question, press **ZERO** on your keypad now. Press **ZERO** to ask a question.
- XIII. **JOSH** reads second planted question (30 sec.)
Our second question comes from Jessica in Ashland who asks: What happens after I connect with Legal Aid of the Bluegrass?
- XIV. **ANGELA** answers question (1 min.)
- When you call us, you are connected to a benefit counselor. The counselor will ask for your address, date of birth and social security number as well as your income and resource information so we can better assist you with your benefit needs.
- XV. **JOSH** shares results from Poll Question #2 (30 sec.)
- Before we continue with questions, here are the results from our second poll question **[Add results]**
- XVI. **JOSH:** Again, if you'd like to ask a question, press **ZERO** on your keypad now. Press **ZERO** to ask a question.
- XVII. **JOSH** reads third planted question (20 sec.)
Our next question comes from Anna in Lexington who asks: How will you know if I qualify for these benefit programs?
- XVIII. **ANGELA** answers question (1 min.)
- During our first conversation, we will ask you several questions. Based on your answers, we can determine if you are likely eligible for one or many of these benefit programs. And once we know which programs you're likely eligible for, we can help with the application process, if you'd like.
- XIX. **JOSH** reads fourth planted question (30 sec.)
Arnold, also from Lexington, asks: I think I may already be receiving some of these benefits? How can I be sure?
- XX. **ANGELA** answers question (1 min.)
- Great question. If you are receiving some of these benefits, you could be eligible for others. We have individuals call us quite often who are currently receiving the Medicare benefit, but not SNAP assistance, however, they are likely eligible for it. Our interviewing process is set up in a way that we can tell if you are already receiving a benefit.

- XXI. **JOSH:** Again, if you'd like to ask a question, press **ZERO** on your keypad now. Press **ZERO** to ask a question.
- XXII. **JOSH** reads fifth planted question (10 sec.)
All right, here is another great question. It comes to us from Daniel in Owenton, who wants to know more about the Low-Income Heating Assistance Program, what it is and how to know if you qualify?
- XXIII. **ANGELA** answers question (1 min.)
- The Low Income Heating Assistance Program, or LIHEAP, is a federally funded program that can help you with your heating and cooling costs. There are two ways the program helps. The first is with a subsidy help pay a current energy bill. The second is crisis assistance when you have a shut off notice, an eviction notice for unpaid rent if the rent includes heating costs, or if you have 4 days or less worth of a heating source such as wood, coal or kerosene. [ADD INFO ON HOW TO KNOW IF YOU QUALIFY]
- XXIV. **JOSH** reads sixth planted question (10 sec.)
Thanks Angela! We're going to take one final question, which comes from Betty in Erlanger. Betty asks: Can I still qualify for these benefit programs even if I have some money in my savings account?
- XXV. **ANGELA** answers question (1 min.)
- Absolutely. There is a varying asset limit for all of these. The highest limit for example, is for Medicare Part D Extra Help. An individual can have up to \$13,820 in liquid assets, and a married couple can have up to \$27,600. The SNAP program on the other hand has a \$3,250 asset limit, and the other programs vary in between those.
- XXVI. Closing remarks from **JOSH** (1 min.)
- Thank you, Angela, and thank you all for joining us for this call! Unfortunately, we couldn't get to every question. If we didn't get to your question, or if you're holding on the line to speak to one of our volunteers, please stay on the line to leave a voicemail message. State your name, where you're from, and which benefit programs you're most interested in and someone will get back to you soon. If you would like to find out more information about Legal Aid of the Bluegrass visit lablaw.org or call 1-866-516-3051. That's 1-866-516-3051. Thanks for your time, and have a great day!

Appendix C: Sample Screener Script

Hi, I'm [NAME] a volunteer for today's event. Thanks for participating. You pressed 7 indicating you would like more information about benefits programs. Please remember this pre-screening is CONFIDENTIAL and someone at Elder Law of Michigan will be reaching out to you soon.

Can I get your name and where you are calling from? **[If not listed correctly, fix it in the Name and Location boxes.]**

What is the monthly household income for you and your spouse (if married)? **[Gather response]**

Are you currently enrolled in any of the following benefits?

- Medicare Part D Extra Help **(LIS)**
- **SNAP** (Supplemental Nutrition Assistance Program, or food stamps)
- Medicare Savings Program **(MSP)**
- Low Income Home Energy Assistance Program **(LIHEAP)**
- Medicaid
- I'm not sure **(Not Sure)**

Okay, thank you so much. Again, your benefits screening is FREE and CONFIDENTIAL and will be provided by Elder Law of Michigan. You will get a call in the next few days. I'll send you back to the event now.

[Press "Send back to Conference"]

***If a participant is trying to give you too many details, please remind them that you are a volunteer and this is just a pre-screening for Elder Law of Michigan and they will reach out to them soon.*