Informational Call for Returning Grantees and Prospective Applicants for the Benefits Enrollment Center (BEC) Grants

Center for Benefits Access

September 5, 2023

Agenda

1. Today's Webinar Overview

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2. NCOA & Center for Benefits Access Overview

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3. An Equity Driven RFP Process

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4. Getting Started on the Application

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5. RFP Walkthrough

_____

6. Next Steps

Today's Webinar Overview

Overview

Ann McCreedy - Director of Social
Safety Net Systems and Solutions

Shaneece Gaines -
Senior Program
Specialist

Introductions

- Ann McCreedy – Leading the presentation today

- Shaneece Gaines – Active answering questions in the chat

Overview

Housekeeping

- Land, Labor, and Current Event Acknowledgement

- Mute when not speaking

- Ask Questions in the chat

- The recording and slides will be made available after the webinar

National Council on Aging & Center for Benefits Access Overview

National Council on Aging – Founded in 1950

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.

Methods for Reaching Our Goals

Resources   Trusted, unbiased information that enables 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

About the Center

NCOA Center for Benefits Access (the Center) supported by ACL

- 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.

- 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.

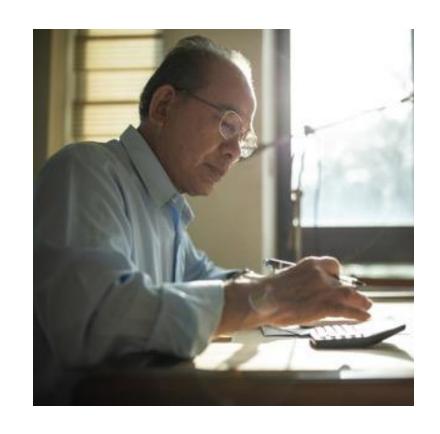 - Assist with application troubleshooting and follow-up.

An Equity Driven
RFP Process

2024-2025 Benefits Enrollment Center Grants

Summary of the Grant Opportunity

Find and enroll Medicare beneficiaries into one or more of the five core benefits

- Medicare Part D Extra Help (or Low-Income Subsidy, LIS)
- Medicare Savings Program (MSP)
- Supplemental Nutrition Assistance Program (SNAP, formerly food stamps)
- Low-Income Home Energy Assistance Program (LIHEAP)
- Medicaid

Based on the availability of funds, NCOA expects to award between 4-8 new organizations in this round.

2024-2025 Benefits Enrollment Center Grants

Summary of the Grant Opportunity

Reaching special populations

- People residing in rural areas/border communities
- Immigrants
- African Americans
- Asian Americans
- Hispanic/Latinos
- Members of tribal communities residing on and off reservation land
- People with disabilities
- Members of the LGBTQ+ community
- Those with limited English proficiency (LEP)

An Equity Driven RFP Process

Qualitative Methodology

- Conducted 24 interviews across three types of community-based organizations (CBOs)

Quantitative Methodology

- Used publicly-available data and program-supplied data to conduct three analyses

Challenges & Limitations

- Limited number of interviews with the same "type" of interviewee due to the Paperwork Reduction Act.
- Quantitative results are directional and provide a relative sense of where coverage is stronger/weaker, due to data limitations

An Equity Driven RFP Process (cont.)

Awareness of the BEC Grant

Smaller, grassroots CBOs are less likely to be aware of the BEC grant opportunity than larger, more established organizations.

Applying for a BEC Grant

Capacity constraints and limited institutional know-how can hinder smaller organizations in the grant-writing process.

Requirements of the BEC Grant

Reporting and staffing requirements are time- and resource-intensive, placing smaller, newer, and more rural CBOs at a disadvantage.

Selection and Notification of BEC Grant Award

A lack of proactive, in-depth feedback limits iterative improvement among unsuccessful applicants.

Changes in the RFP Process

1

Reduced the length of the application.

2

Created funding tiers that enabled smaller and grassroots organizations that may specialize in just one or two of the core benefits to be competitive in the process.

3

Outreach to past applicants who were not funded but high scoring and provided them feedback about what the common issues were in unfunded proposals that cycle.

4

Researched community-based organizations in geographies not currently serving and invited them to apply.

5

Scoring rubric included in the RFP.

6

Mindful inclusion on the review panel.

7

Gathering demographic information of review panel participants and analyzing awarded scores through several lenses including by race and gender.

8

Timely and specific feedback offered to all applicants.

Changes in the RFP Process

Timely and specific feedback

- Each reviewer is given a detailed description of what a median score for each section would entail. If they want to score above or below the median points for that section, they will need to provide a brief narrative description justifying the score.

- The scores and the narrative justifications will be made available to all applicants after award decisions have been made.

Example from scoring rubric

Concerns	Criteria	Strengths
(Provide one or more specific examples of what was missing from the narrative that was needed in order to score at the mid-point of the range)	(Provide a score at the mid-point of the total offered if the narrative aligns with the description provided in each box below.)	(Provide one or more specific examples of what was described in the narrative that exceeded in depth and/or breadth that was needed in order to score at the mid-point of the range)
	Statement of Need Using data, the narrative describes the demand for benefits enrollment within 1-2 target populations for benefits enrollment. Score: _____ / 5	

Changes in the RFP Process (cont.)

Post-award changes

• Streamlined reporting and will improve the useability of the reporting system in the new cycle.

• Changed the frequency and focus of required calls to build technical knowledge.

• Increased opportunities for peer-to-peer sharing.

• Offered grantees choice to opt into the trainings that feel the most useful to their work and professional development.

Getting Started on the Application

Getting Started on the Application

Minimum Criteria - (Responses indicated with a * would disqualify you from consideration)

- What best describes your type of entity?
  - ❑ Nonprofit organization (including faith-based organizations)
  - ❑ State government agency
  - ❑ Local government agency
  - ❑ Tibal entity
  - ❑ For profit entities*
  - ❑ Institutions of higher education/Colleges/Universities*
- Does your organization currently serve adult Medicare Beneficiaries (adults 65 and older or younger adults with disabilities?
  - ❑ Yes
  - ❑ No*
- Does your organization currently assist individuals with first time enrollment in Medicare and/or Social Security?
  - ❑ Yes
  - ❑ No*

**In the system, it will flag for you if you have answered in such a way that indicates you do not meet the minimum criteria. However, it will not block you from completing the rest of that application. PLEASE do not spend time completing the rest of the application if you do not meet the minimum criteria. Your application will not be reviewed.

Getting Started on the Application

Consider in what ways you would expand the current BEC network

Nationwide BEC Service Footprint (2020-21)
County-Level Population of Low-Income Medicare Beneficiaries

Benefits Enrollment Centers Network (ncoa.org)

Getting Started on the Application

Consider in what ways you would expand the current BEC network

2020-2021 BEC Enrollment Population Footprint

59.9%	Low-Income African American Seniors
59.5%	Low-Income Asian American and Pacific Islander Seniors
52.5%	Low-Income Limited English Proficiency Seniors
51.3%	Low-Income Adults with a Disability
50.0%	Low-Income Seniors in Border Communities
49.4%	Low-Income Medicare Beneficiaries
49.1%	Low-Income Hispanic/Latinx Seniors
48.6%	Low-Income Senior Veterans
42.7%	Low-Income Seniors in Rural Areas
40.7%	Low-Income American Indian and Alaska Native Seniors

Getting Started on the Application

Creating a WizeHive profile

- We will provide a link to a brief tutorial of how to create your profile/login to access the application.

- If you are a returning grantee, your current login will work for this application.

A Walkthrough of the RFP Questions with Examples of Strong Responses

Approach – Outreach – Total possible points: 15

Scoring Criteria - Identifies planned demographic-based outreach activities for 1-2 target populations. Names at least one partner engaged in the outreach and enrollment process. Describes the qualifications of listed partner.

Question: Provide a brief description of your geographic area and how your proposed activities, and potential partners would engage with one to three of the target populations that you intend to focus your outreach and enrollment efforts on. (500 words).

High scoring response	Low scoring response
Example Org has served as the regional hub for LGBTQ+ activities for many years. No other LGBTQ+ community centers serve this region. Example Org. has become a recognized service site for this community by providing a food pantry, senior and youth services, support groups, and social activities. We are an open and affirming organization which is considered a safe and welcoming place for this population...Annually, Pride events in June and October draw 10-20,000 participants. Tabling at these events and sponsoring outreach events related to Gay Pride will educate many potential enrollees about these programs. Through our food pantry, senior services, and support groups, we have created a welcoming environment that will increase our ability to serve this population and enroll them in programs.	The 123 Center will partner with and connect with LGBTQ support groups and communities. The 123 Center does not discriminate in its services offered to clientele.

Statement of Need – Total possible points: 5

Scoring Criteria - Using data, the narrative describes the demand for benefits enrollment within 1-2 target populations for benefits enrollment.

Question: Describe why your community or proposed service area needs benefits enrollment support (250 words)	
High scoring response	**Low scoring response**
...When trust is low, individuals are less likely to seek assistance. People with disabilities have been stigmatized throughout history and are reluctant to seek assistance from traditional agencies. Therefore, a BEC is needed in the Example Region to provide the support required and increase enrollment to Medicare beneficiaries, older adults, and adults living with disabilities/chronic conditions who cannot get the help needed from a traditional agency... During the 2019-2020 contract year, ABC Program staff provided services to more than 1,750 persons, all of whom self-reported their disability. 30% were over 65, over 50% percent were women, and 25% were from traditionally underserved populations.	XYZ Program serves people from all socioeconomic classes, however services are most often provided to low-income people whom either do not know where to access or know that they qualify for benefits. Having XYZ Program as a benefit enrollment center will help those struggling truly get the help they need and gain access to achieve greater economic security and create more economic activity in the communities where they live.

Approach – Program Design (cont.)

Questions:

1. Is your organization committed to using the BenefitsCheckUp® as a screening tool, unless your state provides an equivalent tool? (Yes or No)

2. Would your organization like training on BenefitsCheckup®? (Yes or No)

Approach – Program Design – Total possible points: 10

Scoring Criteria - Describes how many people organization intends to serve. Describes the methods and typical activities in assisting clients to apply for benefits. Describes approach to providing access to services for speakers of languages other than English.

Question: Describe how your service delivery model, experience assisting clients with completing applications, and working with public agencies for any of the core benefits you intend to address with your clients, will help your organization achieve its goal. (500 words)

High scoring response	Low scoring response
An average of 400 participants use the food pantry monthly and approximately 50% are seniors and adults with disabilities. The Outreach Team will promote and host weekly BEC clinics to engage potential eligible participants to apply for benefits. We will a) Provide regular information to Saturday participants about BECs, b) Schedule an appointment for the participant at their convenience and c) Assist participants with applying for benefits on pantry day. This approach would engage and help 40-50 unduplicated participants a month during pantry time to connect to benefits.	We will go into retirement homes, local clinics, elderly apartments, churches and present sessions about our program. Small town word of mouth always works. We will accept referrals from other agencies, clinics, doctor's office, court system as well as places of employment.

Make-up of Proposed Service Area – Total Possible Points - 10

Scoring Criteria - At least 26% of the people served by the organization are Medicare eligible; serve at least one of the target populations at 50% or higher.

What is the estimated percentage of people your organization currently serves that are Medicare beneficiaries? *

○ Less than 10%

○ 11%-25%

○ 26%-50%

○ More than 50%

Please identify the estimated percentages of potential clients in your service area. (Totals could be more than 100% for those that identify as more than one.)

Clients identifying as Black *

○ Less than 10%

○ 11%-25%

○ 26%-50%

○ More than 50%

Clients identifying as Hispanic or Latino *

○ Less than 10%

○ 11%-25%

○ 26%-50%

○ More than 50%

Clients identifying as Indigenous and/or Native American *

○ Less than 10%

○ 11%-25%

○ 26%-50%

○ More than 50%

Make-up of Proposed Service Area – Cont.

Scoring Criteria - At least 26% of the people served by the organization are Medicare eligible; serve at least one of the target populations at 50% or higher.

Clients identifying as Asian American and/or Pacific Islander *

○ Less than 10%
○ 11%-25%
○ 26%-50%
○ More than 50%

What percentage of your target population do you anticipate would come from a rural community? *

○ Less than 10%
○ 11%-25%
○ 26%-50%
○ More than 50%

Definition of Rural Communities

What percentage of your target population do you anticipate would identify as people with disabilities? *

○ Less than 10%
○ 11%-25%
○ 26%-50%
○ More than 50%

Optional

Please describe your experience reaching and providing services to the LGBTQIA+ community.

Word Count: 0 / 100

Benefits Enrollment: Total Possible Points – 10

Scoring Criteria - Has past experience and plans to continue enrolling people at the number of core benefits required by the size of the grant requested; May or may not assist in enrollment of other benefits beyond the 5 core benefits.

Which of the following core benefits do you have experience enrolling people in? *

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

Please indicate other benefits you have experience enrolling people in. *

☐ Subsidized Transit
☐ Housing Subsidies
☐ Supplemental Security Income (SSI)
☐ Social Security Disability Insurance
☐ Other Food Programs (Senior Farmer's Market/Commodity Supplemental)
☐ Childcare Subsidies
☐ Affordable Connectivity Program
☐ Unemployment
☐ Tax Benefits (Earned Income Tax Credit
☐ Property Tax Assistance
☐ Free Tax Preparation Sites (VITA)
☐ Temporary Cash Assistance
☐ Temporary Assistance to Needy Families
☐ Bureau of Indian Affairs Direct Assistance
☐ Veterans Benefits
☐ Other Prescription Drug Benefits
☐ Other

If provided funding, which core benefits would your organization plan to enroll clients in? (You are not required to enroll clients in all five core benefits, however, individuals you reach out to and enroll must be Medicare beneficiaries.) *

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

Potential Award Amounts

Grant Amount	Minimum Requirements
$25,000	- Enroll clients in one of the five core benefits. - Provide quarterly reporting on all relevant metrics. - Target to enroll or re-enroll a minimum of 100 clients. - Participate in training on BenefitsCheckUp®.
$75,000	- Enroll clients in a minimum of two of the five core benefits. - Provide quarterly reporting on all relevant metrics. - Target to enroll or re-enroll a minimum of 250 clients. - Participate in training on BenefitsCheckUp®. - Participate in two other capacity building/training sessions during the grant cycle.
$125,000	- Enroll clients in a minimum of three of the five core benefits. - Provide monthly reporting on all relevant metrics. - Target to enroll or re-enroll a minimum of 400 clients. - Attend Age + Action.
$175,000	- Enroll clients in all five core benefits. - Provide monthly reporting on all relevant metrics. - Target to enroll or re-enroll a minimum of 500 clients. - Attend Age + Action.
$250,000	- Enroll clients in all five core benefits. - Provide monthly reporting on all relevant metrics. - Target to enroll or re-enroll a minimum of 650 clients. - Attend Age + Action.

Management and Organizational Capacity – Total Possible Points – 10

Scoring Criteria - Describes their person-centered benefits enrollment approach or indicates how they will incorporate person-centered approach into service delivery. At least one staff possess at least 1 year of experience in benefits enrollment, collects data in most of the areas but may not use data for decision making.

Question: How does your organization approach holistic, person-centered benefits enrollment assistance? (250 words)	
High scoring response	**Low scoring response**
ABC Place and others mentioned above is based on best practices in aging and health care. Service Coordinators are proactive in screening and assessing what best meets the needs of the individual. One of the unique benefits of our outreach effort is that our current program is set up to provide home visits for those who are unable to mobilize or have limited mobility and/or lack transportation no matter where they live. Service Coordinators are placed in the community served to increase accessibility and visibility. With a combination of phone calls, mailings, or home visits, we have systems in place to meet the individual's needs to ensure seamless assistance when identifying needs and risks when applying or recertifying for core benefits and other need-based programs.	ABC Place services are designed to be person-centered so individuals determine their own individual short and long term goals. ABC Place services insure (sic) that individuals continue to live and prosper in the community of their choice.

Management and Organizational Capacity – Total Possible Points – 10

Scoring Criteria - Describes their person-centered benefits enrollment approach, or indicates how they will incorporate person-centered approach into service delivery. At least one staff possess at least 1 year of experience in benefits enrollment, collects data in most of the areas but may not use data for decision making.

Question: Does your organization provide follow-up services to your clients over a period of at least 3-6 months? Yes or No If yes, please provide a brief explanation. (100 words)	
High scoring response	**Low scoring response**
The ABC Place business practice has an established task of consumer follow-up. The ABC Place will contact the consumer between 4-6 weeks following the submission of applications to confirm that the consumer has accessed the benefits. If the consumer has not received any notifications about the benefits, then the ABC Place will offer to follow-up with the application agencies. Once approved for benefits the ABC Place will move the consumer from their active application list to their list of annual follow up. The ABC Place will connect with our BEC consumers annually. ABC Place ensures all annual redetermination requirements are met so that benefits remain active. The Benefit Enrollment Specialist will contact consumers via telephone annually and if needed, will perform a home visit.	We follow up with clients within a month to be sure they have received communications from the administering organizations.

Diversity, Equity, & Inclusion – Total possible points: 10

Scoring Criteria - Describes at least one specific organizational strategy, policy or procedure related to DEI; At least one but potentially not all of the following groups reflects the diversity of the community served; staff, board members, and/or volunteers.

Questions:

1. Provide a brief statement on your organization's approach to diversity, equity and inclusion (DEI). (100 words)

2. Please describe how the leadership, staff, proposed partners, board members, and volunteers reflect the make-up of the communities you propose to serve. (250 words)

Objective

Project Goal, Objectives, Measures, and Methods

State your overall goal for the number of clients you intend to enroll in the core benefits.

Objective: *

Objective Methods *

Total number of beneficiaries served under this objective: *

Measures   Targets

Objective

Project Goal, Objectives, Measures, and Methods

State your overall goal for the number of clients you intend to enroll in the core benefits.

Objective: *

Enroll 550 beneficiaries in 2 or more core benefits.

Objective Methods *

Meet 1:1 with Medicare eligible individuals to assist them to complete the applications.
Follow up with assisted individuals at 30 and 60 days to provide support / problem solving.

Total number of beneficiaries served under this objective: *

550

Measures	Targets
Number of enrollees identifying as Hispanic or Latino	400
Number of client contacts (new intakes)	1,000

Next Steps

Next Steps

❑ Submit questions by 9/15/2023 to <u>centerforbenefits@ncoa.org</u> with FY24 RFP in the subject line.

❑ Responses to questions will be published by 9/21/2023 on this website - Grant Opportunity: Benefits Enrollment Center (ncoa.org)

❑ Notification of award or non-award will be made on or around December 1, 2023

❑ Work expected to commence on January 1, 2024