

DATE: June 7, 2012

SUBJECT: Meeting Notes: Mapping Your Community's Resources to Improve Access to Public Benefits for Seniors

Attendees

Sara Tribe, Policy Associate, NASUAD
Karl Cooper, Policy Associate, NASUAD
38 callers from 29 states, DC and Canada

Welcome

Ms. Tribe welcomed everyone to today's call, and invited participants to stop by the NASUAD table in the Exhibit area at the SHIP Conference in Atlanta to say hello, if they were there that day.

Ms. Tribe then introduced Josh Wertheimer, Program Associate at the National Council on Aging (NCOA), who would be presenting "Mapping Your Community's Resources to Improve Access to Public Benefits for Seniors." She explained that Josh's presentation would explore different ways to think about all of the steps involved in making sure clients get and keep the public benefits for which they are eligible, and to help everyone think more strategically about partnerships with other organizations and agencies in the community. This meeting would present a framework for identifying the gaps in the community and discuss examples of the kinds of partnerships - both traditional and creative - that other organizations have used to fill those gaps.

Presentation: Mapping Your Community's Resources to Improve Access to Public Benefits for Seniors

Mr. Wertheimer stated that there are always people who come to community mapping and want to hear about geographic mapping, but that's not what we will be talking about today. What will be discussed is what resources are available in our communities, and how to put them together.

He briefly described NCOA, which is a nonprofit service and advocacy organization, whose mission is to improve the lives of millions of older adults, especially those who are vulnerable and disadvantaged.

He added that in terms of health, we will be discussing those with more than one chronic condition, and for income levels, those whose income is at or just above the federal poverty level. Often for this financial cohort, one accident or unfortunate event can send a person into either poverty, or extreme financial insecurity.

He described benefits access, which includes: A basic level of income (SSI), Medical care (Medicaid and MSPs), Prescription drugs (LIS and SPAPs), Food (SNAP), Heating and cooling (LIHEAP)

- Benefits make a big difference. With an average of \$11,000/year income, adding these benefits can double a client's income.
- A few benefits are money in someone's pocket (like SSI); other benefits make income available to them, such as LIHEAP, which provides heating fuel assistance.

Community mapping involves thinking more broadly about benefits access, being more strategic in your partnerships, and building coalitions. The goal to benefits access work is enrollment and retention of benefits.

Figuring out your target population for benefits access:

- Different populations may have different needs or require different kinds of assistance
- A different community map can be drawn for each of your target populations
- What are the distinctive needs of your target population(s)?
- How do those needs require different assistance from the community?

Focusing on more general needs, Mr. Wertheimere suggested as we go through this presentation, participants should think about what specific needs their community might need. A homebound population's needs might differ from a population that might have limited English.

5 Phases of Benefits Access: Outreach and Education; Screening; Application Assistance; Using the Benefit; Retention/Recertification

- Education: Client education is a very important part of this process, as it can cost much time and money to redo many of the applications if they fail to recertify.
- The goal during the Application Assistance phase is helping an individual move from screening eligible for a benefit, to being accepted into the benefit.
 - Verify information contained in the application – people who work at State DHS or relevant agency can do this
 - Adjudicate the application: people who work at State DHS or relevant agency can do this
- Retention: almost every benefit program has some sort of recertification program, and if people don't recertify and go through the process, they cycle in and out of the programs. It is a waste of everyone's time to have to reapply.

As we think about all of these steps, it's important to keep in mind the things that we can't control at our level.

What are your strengths and weaknesses in regards to community mapping?

- Looking at your list of benefits access activities, which ones are you best suited to do?
- Which activities are hardest for you to do? Send them elsewhere if you can.
- Where in the process is your "hand-off"? There is a huge variety of when that hand off occurs. Be aware of when that needs to happen.

Bridging the Gaps: what happens after you refer a client elsewhere?

Examples include:

Outreach and Education : if someone calls in with a specific need, will anyone educate them about other benefits they might be eligible for?

Screening : What happens after someone is screened for benefits and appears eligible for multiple benefits?

Application Assistance: Is someone making sure clients don't get lost in the shuffle after submitting applications?

Examples of Bridging the Gaps: Government Agencies

- Non-traditional sources of outreach:
 - DMV: can send out a mailing targeted to those who are over 65, and have a lower income about services available to them.

- Assessment and Taxation: have listings of those who are delinquent on taxes, and might be able to target a mailing for services available to those individuals.
- Unemployment Office: there are seniors who are looking for work (as people are working later in life these days), so that might be somewhere that they can find out about services.
- Office of Faith-Based and Community Services: community churches are great places to distribute information, as many people go there for help.
- Eligibility Agencies:
 - Completing perfect applications: letting the agency know that they will receive a complete application from your agency will make the eligibility worker's job easier. Processing time goes down for applications that are easiest to do.
 - Access to state databases to check on the eligibility status of clients: we are seeing an increasing number of agencies who are willing to give access to trusted agencies in the community to state databases. This allows them to process faster on their end as well.

Building Community Coalitions

- Are your partners at the table with you? If not, what are opportunities to start conversations?
- What's your vision for where you fit in?
- What brings your partners to the table?
 - What are their goals?
 - What incentives are there for them to work with you?
 - What constraints are your partners under?
- What are the win-win-win opportunities that exist for you and your partners and your clients? A food bank was having a hard time with the SNAP program, and when the local AAA volunteered to help them with it, they were very happy to refer people to it.

Best Practices for Community Mapping

- Focus on intermediate goals
 - What can you accomplish in 3 months that would make it easier for your clients to access benefits? Builds momentum
- Not necessarily new partnerships, but more seamless ones
 - How do your clients work with your colleagues in your organization?
 - How do your clients work with your partners?

- Are there ways to make it easier for your clients to move between people and organizations?

Adapting your community mapping

- Community mapping is not a one-time process, it's ongoing
- As new challenges arise, this process can be done again.
- Tracking your clients is one of the best ways to keep your community mapping dynamic
 - Where in the benefits access process are many of your clients falling off?

Resources: Center for Benefits: <http://www.centerforbenefits.org/>

Q & A

Q: Is there any feedback on the website?

A: In Massachusetts, we're looking at the website to see what clients might be eligible to receive. We do a private benefits checkup for clients who are interested, for a small fee. If there is particular data that you want to collect, it can be a useful tool. The benefits checkup is free, <http://www.benefitscheckup.org/> but if you are interested in collecting specific data, there is a small fee involved.

Q: Susan Shepard from WA: ADRC and I/R have been doing benefits reimbursement for years- but what about coaching individuals for being prepared for the recertification process for the future?

A: I mentioned cycling earlier, and one of the best ways to prevent it is to tell clients to be on the lookout for the documents in the mail- and let them know to come in to the counselor for help in recertification. Sometimes people think the documents are junk mail, throw it out, and have no idea what they have done.

Josh added that this training is a little different than others because participants don't usually have a lot of questions during the session, but as you start to think about how this applies to your agency, one or two months from now, NCOA would love to hear from you about your benefits access work and what help you might need from us.

Ms. Tribe thanked Josh Wertheimer for his presentation, and the participants for their time.