

Building Sustainability for your Benefits Enrollment Programs

May 31, 2018



Improving the lives of 10 million older adults by 2020

ncoa
National Council on Aging

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Please ask your questions!

- We've muted all the lines to eliminate background noise as much as possible.
- During the presentation, please ask questions or share your comments using the chat feature in ReadyTalk.

Agenda:

- I. Key elements of an effective sustainability plan, how to strengthen partnerships, where and how to find additional funding and additional insights- **Dianna Campbell, Chief Development Officer, NCOA**
- II. Building sustainability into benefits enrollment programs vis-à-vis volunteers, strategic partnerships and small grants- **Carolina Rodriguez, Mexican American Opportunity Foundation**
- III. How volunteers, as well as a small grant for disaster recovery is helping to leverage our BEC- **Desirae Mearns, Area Agency on Aging of Palm Beach and the Treasure Coast Inc.**
- IV. Q&A

Sustainability Planning

Dianna Campbell
Chief Development Officer
NCOA

Key Sustainability Areas to Consider

- **Program** – Do you offer what your community needs? How are you measuring?
- **Board** – Do you have a board? Or community committee? Activate a give/get - \$1000-\$10,000 each.

- **Partnerships** – What problems do you solve and who is also interested in that problem?
- **Individuals** – Taboo to get \$5 from people that you helped in the past – or is it? Activating Champions

Key Sustainability Areas to Consider

■ Program

- ▶ Building Better Budgets – Revise and re-direct funds
- ▶ Measure and report success. Funders like to know that they are partnering with winning organizations. Talk in terms of quantitative and qualitative measures impact on the community

■ Board – advocates, champions, and cheerleaders

- ▶ Activate a give-get
- ▶ Develop a lead to champion the board on making “ask”
 - Board chair or Development lead
 - Develop tool(s) – FB ads, emails, newsletters – be simple and consistent

Key Sustainability Areas to Consider

■ Partnerships

- ▶ BEC/SNAP – look at all the dimensions of Access to Benefits offering – share your metrics. *
 - Pharma, oil/energy/gas, Healthcare/Health Insurers, technology, veterans, local hospitals/systems, women, universal access, home, insurance, hunger and financial institutions

■ Individuals

- ▶ Individuals – you help people and they are grateful. Why not ask them to tell and friend, post online and consider donating \$5 to help someone else find access to benefits.

Local/Regional Opportunities

- **Local and regional funding:**
 - ▶ **Walmart** - up to \$5K, Spark Community - \$500K
 - ▶ **Coca-Cola**
 - ▶ **AmazonSmiles / Matching Gift Programs/ Dollars for Doers / PayPal Crowd funding** - <https://fundly.com/>
 - ▶ **HQ'd companies** — "Community support" or "Corporate social responsibility".
 - ▶ **Regional Health Plans – Horizon NJ, Renown & WellMed**
 - ▶ **Banks – Wells Fargo & BOA**
 - ▶ **Regional/Local Energy - Dominion – BGE, Pepco**

Survey Results: Current Funding Sources

What pain points have you experienced as it relates to creating a sustainability plan for your BEC or SNAP project?

Lack of getting the word out about the BEC to the community and potential partners

- Solutions: Facebook, flyers, impact report, EOF (Everyone's a fundraiser), EOTO (Each one-tell one)
- Recruiting and reliability of volunteer workforce
- Longer terms for funding would help with building a sustainable model

Survey Results: Current Funding Sources

What key takeaways would you like from a webinar on building sustainability for your BEC and SNAP project?

Ability to identify and pursue additional funding streams = 75%

- Develop an effective sustainability work plan = 60%
- Identify and strengthen key partnerships = 58%
- Leverage/bolster volunteers = 28%

Solutions:

Determine what tools do you need from NCOA? Toolkit, Sample deck?

Sample proposal

Survey Results: Current Funding Sources

Sources:

Government grants = 81%

- **Foundation = 43% one respondent said:**

- ▶ *Philanthropy is tired and unreceptive to our BEC work. Existing funders want us to constantly be evolving the program in order to continue to receive the same amount of funding. We are reliant on foundation dollars which are only contracted in one-year increments, which does not allow us to plan for the long-term. Needing to renew foundation funding annually leaves us vulnerable and requires a large amount of staff time, which is considered overhead.*

- **Individual donors = 38%**

- **Corporate Funding =14%**

- **Other = 10%** (this includes state and local funds, plus non-government grants)

- **Membership fees = 3%**

Solutions: Expand corporate and individuals – see examples.

Questions?

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PROGRAM SUSTAINABILITY

Carolina Rodriguez

May 3, 2018



Core Values of Sustainability

1

- Partnerships

2

- Grants

3

- Strategic Planning



Partnerships

- Identifying partnerships
- Branding your program
- Creating a network of partners

Grants

- Resource sharing opportunities
- Private/small grant initiatives
- Identifying marketing/brand funding



Strategic Planning- Looking Ahead

- Volunteers
- Resource sharing opportunities
- Aligning partnerships



BUILDING A SUSTAINABLE BEC

Area Agency on Aging of Palm Beach and The Treasure Coast

BOA Grant

- Bank of America and NCOA have partnered to provide small grants to areas effected by the active 2017 Hurricane season.
 - Provide education on how benefits can help plan
 - Collect information on Beneficiaries who used their benefits to help in the disaster.

Social Security Referrals

- We have made a strong relationship with our local SSA office to provide help with:
 - Application assistance referrals
 - Benefit explanation assistance
 - Beneficiaries understanding of SSA scope of work
 - Coordination of benefits
 - Staff training

- Many beneficiaries mistake our local SSA office for DCF as they are steps from one another. SSA is confident in referring clients to use for a full comprehensive look at benefits

Utilizing Volunteers

- There is no such circumstance in having “too many” volunteers!
- Our volunteers:
 - Help clients apply for benefits
 - Make reminder calls to ensure someone is prepared for their appointment
 - Perform recertification calls
 - Help at outreach events (booth, presentations, etc.)
 - Recruitment of new volunteers!

ADRC Helpline

- We are fortunate to have the ADRC Helpline in house!
 - Provides initial screening
 - Make appointments for application assistance
 - Collect pertinent demographic information
 - Use TimeTap appointment platform

Staff difficult cases with LTC and MMA coordination of benefits.

Also provide clients with additional information among other programs provided by the ADRC to provide a full circle person center approach.

Hunger Relief Committee

- United Way of Palm Beach County's Hunger Relief Committee
 - BEC Coordinator participates in monthly Senior Hunger Relief Sub-committee.
 - Helps to promote BEC application assistance
 - Generates outreach events with niche towards Medicare Beneficiaries needing SNAP benefits
 - Collaborates with local leaders in aging network to strategize efforts to reduce/eliminate hunger.

QUESTIONS?

