



Economic Security & Social Safety Nets Initiatives: SNAP Grantee Orientation Guide



Welcome Message

We are thrilled to welcome you to join us in our mission to assist older adults in accessing SNAP benefits to enhance their quality of life. Since 2014, NCOA's Center for Economic Well-Being (CEW) has been supporting Supplemental Nutrition Assistance Program (SNAP) Enrollment Centers (SECs), which have significantly increased the enrollment of older adults in SNAP. Today, our network of SECs spans across 13 states, and we are honored to partner with your organization to enhance the lives of millions of older adults, especially those facing food insecurities.

The Economic Security & Social Safety Nets Initiatives at NCOA eagerly anticipate providing guidance and support to your organization on this journey. We look forward to celebrating your success in improving the economic security of low-income older adults in your communities.

Sincerely,



Ebony White

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The National Council on Aging (NCOA) is an organization that advocates for everyone's right to age well, regardless of gender, race, sexual orientation, income, or location. It works with national and local partners to provide resources, tools, best practices, and advocacy to ensure that every person can age with health and financial security. NCOA, founded in 1950, is the oldest national organization focused on older adults.

Overview of Center for Economic Well-Being

The Center for Economic Well-Being at NCOA assists community-based organizations in identifying and enrolling older adults and adults with disabilities who have limited means into eligible benefits programs. This helps them maintain their health, security, and independence. The Center achieves its mission by creating and disseminating tools, resources, best practices, and strategies for outreach and enrollment in benefits programs.

At the heart of our mission, we empower local, state, and regional organizations to connect with and support older adults and adults with disabilities in accessing the benefits they deserve. We equip them with vital tools and resources to guide individuals through application and enrollment. Through our dedication to sharing best practices and cost-effective strategies, we strive to advance knowledge and improve outreach efforts. Together, we are fostering the establishment of Benefits Enrollment Centers nationwide, ensuring people-centered approaches in providing education and access to benefits that pay for healthcare, food, and more.

The Center receives funding from the Medicare Improvements for Patients and Providers Act (MIPPA) through a cooperative agreement with the U.S. Department of Health and Human Services' Administration for Community Living (ACL). Since 2009, the Center for Economic Well-Being has served as the ACL MIPPA Resource Center.

We're thrilled the Walmart Foundation is continuing its generous support of NCOA's benefits access work. This support helps us expand outreach and application assistance for low-income older adults to enroll in the Supplemental Nutrition Assistance Program (SNAP).

About SNAP Grantees

NCOA's Senior SNAP Enrollment Initiative aims to increase participation in SNAP, the most effective anti-hunger program in the U.S. SNAP is a benefit available to eligible households through electronic cards (similar to debit cards) that allow them to purchase nutritious food at participating stores. Despite the average monthly SNAP benefit for a household with an older

adult being \$158¹, only 30% of eligible older adults participate². This means 70% of eligible adults aged 60 and above are missing out on this program. The reasons for this underutilization include isolation, lack of transportation, stigma, fear of reprisal, a complex application process, and misinformation about the program. NCOA's initiative provides funding to community-based organizations nationwide to provide direct application assistance, address barriers to participation, and increase access to SNAP.

Various types of organizations serve as SNAP sites, including non-profit organizations, public government agencies, universities, hospitals/health clinics, Area Agencies on Aging (AAAs), Community Action Agencies, faith-based organizations, and food banks. Some grantees operate using a call center model, while others have a physical office or storefront. Each organization brings its unique skills to this work and represents a wide array of community partners.

NCOA's Center for Economic Well-Being and Walmart have recognized a significant need for older adults to have access to food benefits. This is to help low-income older adults supplement their grocery budget to afford nutritious food essential to health and well-being. Learn more about SNAP at: [Supplemental Nutrition Assistance Program](#)

The Person-Centered Approach

The SEC program is committed to supporting a person-centered, holistic approach that considers an individual's complete needs rather than just the need for a specific benefit. This includes informing individuals about benefits and eligibility criteria and assisting them in navigating the application and recertification process.

A person-centered approach recognizes that more than a single call or meeting with an individual may be needed to address all their needs. Therefore, systems are required to maintain contact with and continue assisting the same individual over time. This comprehensive system is more seamless for consumers, as it reduces their burden and duplication of effort and is more efficient in terms of demands on state and federal resources. Research has consistently shown that community-based organizations, using a one-on-one person-centered approach, are the most effective at identifying and assisting potentially eligible individuals for need-based programs.

Coordinated Community

An essential aspect of this process is community mapping. This involves identifying the right partners to engage, defining their roles and commitment levels, and collaborating to decide on

¹ <https://fns-prod.azureedge.us/sites/default/files/resource-files/ops-snap-fy22-characteristics.pdf>

² <https://www.ncoa.org/benefits-participation-map?program=snap>

the most effective outreach and enrollment strategies for the community being served. For more information on partnership and outreach strategies, please refer to Section IX of this guide.

Follow-up with Individuals Assisted

A vital element of the SNAP enrollment center is conducting follow-up conversations and activities to ensure that applications are completed and submitted, problems are resolved, and benefits are received. Specifically, for the current grant cycle, grantees are expected to conduct a follow-up survey approximately three months after an application is submitted to confirm enrollment and ask about self-assessed changes in well-being.

It's essential to follow up with individuals to confirm they are receiving the benefits they applied for and to provide them with any additional assistance and education they may need. This includes ensuring they continue to receive these benefits through recertification as required.

When problems are discovered through the follow-up process, the SNAP enrollment center is expected to contact the individual, the family, and the relevant agency to determine eligibility to resolve delays and other issues in eligibility determination and to understand and address inappropriate denials. The approach should generally ensure that individuals receive the benefits for which they are eligible.

Holistic Approach: Do's & Don'ts

Although the SEC program is focused on SNAP, it is a best practice to help connect individuals with as many benefits as possible at one location. The holistic approach centers on helping the individual avoid the need to visit multiple locations for assistance with benefits. Below are a few examples of the dos and don'ts of this approach.

DO

- ✓ Whenever possible, assist clients in completing more than one application in real-time. To ensure timeliness, provide clients with a checklist of required documents to apply for benefits.
- ✓ Utilize outreach venues and community partners to inform potential participants about the requirements for completing individual benefits.
- ✓ Establish a comprehensive follow-up process for eligible individuals. Successful SECs utilize an integrated telephonic system and/or case management database. Benefit applications can be completed faster by using these methods.



DON'T

- ✗ Please do not report incomplete applications. Report each completed application, even if the client did not complete additional applications for which they were eligible.
- ✗ Do not assume that all community partners and outreach venues know requirements needed for completing benefit applications. Make sure that you have key information on hand.
- ✗ Do not show up to an enrollment event without advertising the requirements for the programs you intend to help participants apply for. Never assume your audience is aware, nor that the contact at the host site has prepared them in advance.

Grantee Engagement

NCOA will communicate with grantees to provide Technical Assistance (TA) and ensure Compliance with the contract requirements. Each grantee partner is assigned a Point of Contact (PoC). The PoC can be found below in Key NCOA Contacts. The PoC is responsible for connecting one-on-one with each grantee at least quarterly and more often as needed. The following sections describe in more detail each TA and Compliance element that will occur during the grant cycle.

Technical Assistance

- Orientation
- Monthly Group TA Calls
- Quarterly 1:1 Meetings
- Age Action Summit

Compliance

- Virtual Monitoring
- Site Visits
- Corrective Action Plans

Budget and Financial Reporting Requirements

Proposed Budget

A part of the application is submitting a proposed budget with a breakdown of how grant funds will be allocated to each line item. The application and budget are to be completed in the WizeHive portal.

The grantee may request a budget modification by submitting a request in writing to the Grantee Point of Contact (Program Associate listed in Key Contacts below). NCOA will review the request, and if approved, guide the grantee through a process to revise the budget in WizeHive.

The following sub-grant modifications require written approval from NCOA:

1. To change the scope of the project objectives and/or activities.
2. To change the required funding amounts necessary to fulfill the stated project objectives.
3. To reallocate between budget lines items an amount greater than ten percent of the total Sub-grant award.
4. To add a line item to the budget.
5. To Sub-grant or contract any portion of this award to a third party.
6. To change the effective period of the agreement.

Financial Reporting

SNAP grantees are required to submit one or more interim financial reports that cover expenses incurred by the mid-point or other defined checkpoints within the grant cycle. The timeframe for the report is outlined in your grant agreement. The templates for interim and final reports will be available in WizeHive at least 30 days before they are due. A screen shot of the interim financial report format is provided on the following page. For a comprehensive view, please refer to the interim and final reports in WizeHive.

Sample SNAP Report

[24 SNAP Reporting] Interim
Financial Report - FAKE SNAP ▾

Save Draft

Mark Complete

Close

Organization Name *

Personnel

Total Budget: Direct Labor *

Actuals: Direct Labor *

Total Budget: Stipends *

Actuals: Stipends *

Total Budget: Fringe Benefits *

Actuals: Fringe Benefits *

Other Direct Costs

Total Budget: Travel *

Actuals: Travel *

BenefitsCheckUp

BenefitsCheckUp® (www.BenefitsCheckUp.org) is NCOA's free online tool that connects older adults with benefits they may qualify for. It is the nation's most comprehensive, web-based service providing benefit program information to older adults with low income and resources.

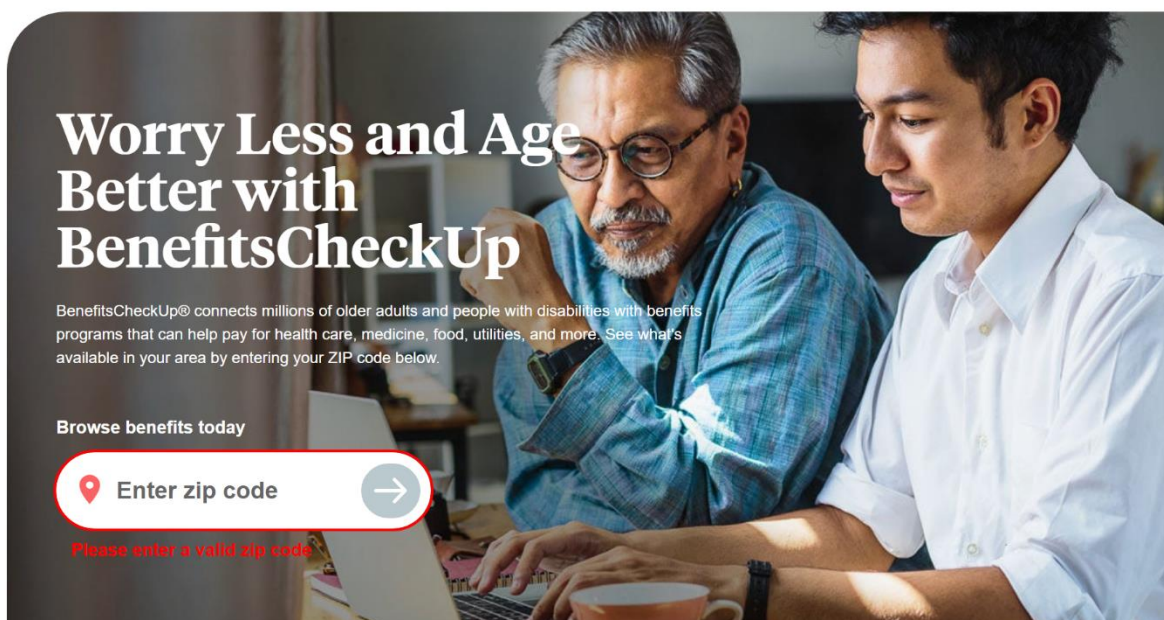
BenefitsCheckUp® screens for public and private benefit programs for all 50 states and the District of Columbia. The programs available are different for each state. Some programs are available nationwide while others are state-specific or available locally such as in a specific county, town, city, or zip code. Users can select the categories of programs that interest them including prescription drugs, health care, housing and utilities, food and nutrition, tax relief, veterans' benefits, and employment. Results are customized to each user.

All grantees are required to utilize BenefitsCheckUp® unless they have received written permission from the grantee Point of Contact waiving this requirement. The requirement will only be waived if there is a parallel state-level system that the grantee is utilizing.



English

Home About NCOA Log In



Additional Information regarding BenefitsCheckUp®

Users of BenefitsCheckUp® can choose the types of programs they want to receive information about. By selecting program categories, users are essentially customizing their own questionnaire. Generally, the more categories they choose, the longer the questionnaire will be. Some program categories have more questions due to their extensive eligibility rules.

Additionally, the questionnaire is dynamic, so the number of questions asked depends on the answers provided to previous questions.

Other added features include:

- BenefitsCheckUp® also has a LiveChat feature that helps users throughout the questionnaire process. The online chat feature is provided by a team member who can answer questions on how to use the questionnaire and navigate through the site.



- **The mobile-ready site** allows users to use the site anywhere, anytime. All parts of the site are responsive and can be used on tablets and smartphones wherever users need to get on the site. This is very helpful to socially isolated users who may not have access to a desktop but have a smart phone. In addition, older adults who are socially isolated can get help from family members or friends wherever they are. The BenefitsCheckUp® results and fact sheets are all printable and can be saved as a PDF. Therefore, no matter what device or where the site is used, the results can be saved and printed later when users have access to a printer.



Benefits Participation Map

Benefits programs can help low-income individuals afford daily necessities such as food, health care, and utilities. However, many eligible older adults are not enrolled in these programs. This tool displays estimated program participation rates for adults aged 65 and older nationally, as well as by state and county. It covers three main programs: SNAP, Supplemental Security Income (SSI, which offers monthly cash aid), and Medicare Savings Programs (MSPs, which provide assistance for Medicare premiums, deductibles, and co-insurance).

The map can be accessed at the following link: <https://www.ncoa.org/benefits-participation-map?program=snap>

To find participation rates, you have two options. You can either click on a state and then select a county within that state, or you can type in the name of a state, county, or ZIP code in the search bar. After making your selection, scroll down below the map to view participation rates for your chosen area(s) and compare them to national and state averages. You can then choose to view data for SNAP, SSI, or MSP programs by clicking on the respective option. The data can be shared or downloaded using the buttons on the righthand side of the page.

Note: Some participation rates include multiple counties. You can view borders around multi-county areas or limit the map to show borders for states and individual counties only. Please visit the website for more information on multi-county groups and the technical report with data collection and analysis details.

Partnerships & Outreach

Purpose of Partnerships

Partnerships play a crucial role in your SNAP projects. Strong partnerships can lead to potential client opportunities and program expansion and bolster education and advocacy efforts.

Identifying potential partners will be a critical part of your community mapping process as you start to implement your project. In this phase, it is important to take stock of your organization's strengths and weaknesses and determine where other agencies in your community can fill in those gaps. You will want to ask yourself:

- Who in my community is best suited to do the things that are difficult or that my organization cannot do?
- What audiences is my organization not serving or not serving well, and who has access to that audience?
- What are the gaps that no one in my current network is filling, and who is the most promising player to fill those gaps?

When thinking of partners, you'll want to identify who is already at the table and who is not, and what incentives bring those groups to the table. What are potential partners' goals and constraints? What are the win-win-win opportunities for your organization, your partners, and your clients?

Types of Partnerships

When building partnerships, find organizations that echo your message and have access to resources you may not have. Create your partnership network by understanding what problems you want to solve and locating others interested in addressing those same issues. A few organizations to consider partnering might include:

- Local offices of agencies administering benefits (e.g., Social Security office, Department of Health/Family Services, Community Action Agencies)
- Other aging and disability agencies, such as Aging and Disability Resource Centers, Centers for Independent Living, etc.
- Senior housing complexes
- Food banks/pantries
- Health providers
- Faith communities
- Ethnic/cultural affiliation groups
- Community locations frequented by Medicare beneficiaries: pharmacies, public libraries, dollar stores, VFWs, etc.

Evaluating Potential Partners

Appendix A includes a sample checklist of organizational characteristics that could be useful in identifying partner organizations to implement benefits outreach and enrollment activities.

Utilizing Partnerships in Outreach

Regardless of the strategy your organization employs for outreach, involving partners in your efforts provides an opportunity to significantly increase the number of people you reach. Here are a few examples of what past SECs have done to leverage partnerships for outreach:

- AgeOptions in Oak Park, IL built relationships with local congregate meal sites to conduct outreach on SNAP assistance and other enrollment programs.
- Elder Law of Michigan suggested creating co-branded materials with the partnerships formed with other community groups to aid in outreach.
- Other Benefits Enrollment Centers have created strategic relationships with local hospital systems to receive referrals post-discharge, partnerships with local grocery stores to distribute food as a form of benefits outreach and education, and relationships with health plans to refer individuals to the Benefits Enrollment Center.

Evaluating Outreach Efforts

Regardless of the tactic you employ, your organization should have a plan in place to track and measure the success of your outreach efforts. This may be as simple as asking a new client about how they heard about your work on an intake form/interview.

Advertising and Marketing

Logo Use/NCOA Language

NCOA maintains strict control over the use of its logo in marketing materials. You are not required to cobrand your grantee materials with NCOA, but if you would like to do so, you must contact us to obtain a copy of the logo and brand guide explaining its proper usage. Grantees must also send us a copy of the marketing materials in which you wish to include the logo for prior approval. Any materials produced with grant funding should contain an acknowledgement to the effect that “This [product] has been produced in part from a grant awarded by the National Council on Aging (NCOA). All opinions expressed herein are those of [agency name] and not NCOA.”

Story Collection Consent Forms

When possible, NCOA prefers to use actual names and photos of individuals who have been helped to share the success stories of grantees and demonstrate the social impact of benefits access. However, we understand that not all clients may want to share their name and image, but they may still be willing to share details of their experience using a pseudonym.

Prior to submitting case studies, please make sure to get clarification on whether the individual is willing to share their story publicly and indicate whether the name used is a pseudonym. Grantees should use the client consent form in Appendix B to obtain written permission from those who are open to sharing their story publicly. If the client is providing their full name or their real photo or video, a consent form must be obtained.

Finding Potential Clients

You may already have a sense of where there are low-income Medicare beneficiaries in your community who may be missing out on SNAP and other benefits. If not, in addition to the Benefits Participation Map, the following tools developed by NCOA could be helpful:

1. Identifying areas where there are higher concentrations of Medicare beneficiaries who may be eligible for Extra Help or MSPs. [Mapping Those Potentially Eligible](#)
2. Identifying areas where low-income older adults have lower technology utilization and/or disaggregation by race or language. [Mapping Low-Income Older Adults by Race, Language, and Technology Access](#)

Types of Outreach

Outreach efforts can take various forms, such as one-time, face-to-face health and community fairs, in-person visits to senior apartment buildings or senior centers, online advertising, radio and television ads, and stationing a staff member at a community location frequented by the target audience. Below are some strategies used by the BEC/SNAP network of grantees.

1. Large-Scale Health Fairs

Collaborate with large healthcare systems or government agencies to organize large-scale health fairs. Partnering with these entities not only draws large crowds but also helps strengthen relationships with administering agencies and garner support from elected officials.

2. Social Media Advertising

Paid social media ads can effectively reach low-income older adults who may be eligible for benefits but may not be aware of your organization and its services. These ads can be customized to specific groups based on location, demographics, and interests. They can be used to promote events or information on a website, or to collect information from users via an online form for direct contact regarding benefits screening.

NCOA has tested using Facebook ads for benefits outreach. For more information, refer to our Facebook toolkit at: [Facebook Advertising Guide](#). **Earned Media** is the opposite of paid media; it is any free media coverage secured by approaching (“pitching”) reporters at local print, radio, and TV outlets. Earned media can be a great, cost-effective way to get the name of your organization and its services out to a broad audience. Learn more in our outreach toolkit at: [Earned Media Guide to Outreach](#)

Sustainability

Thinking about sustaining your benefits outreach efforts beyond the life of the grant period is essential to its long-term program continuity. Diversifying funding beyond a single grant source

enables your organization to plan strategically and adapt to future funding fluctuations without compromising your program's core objectives.

NCOA will support your efforts to diversify the revenue coming in to support your program in the following ways:

1. Providing Technical Assistance – As described above, we will support you in many ways to implement the most effective program possible.
2. Estimated Value of Benefits – We will provide an estimated value of benefits for the total number of completed applications reported in each monthly report. Past grantees have used this information to communicate to other funders the impact of every dollar they invest in the program.
3. Timely information about your progress toward your performance targets – We will provide you with grant-cycle-to-date performance information from your monthly reports. This can give you quantitative information to use in your solicitations for more funding from other sources.

The Value of Volunteers

There is tremendous value in utilizing a volunteer workforce for your SNAP grant. According to the Independent Sector, volunteers contribute an average of \$31.80 of value per hour of volunteer work.

Consider these types of volunteers:

1. Student Interns: You can consider creating a Memorandum of Understanding with a local college or university. On the plus side, student interns will be motivated to perform well for a passing grade or to meet licensing requirements. However, their assignments end after a semester, quarter, or year.
2. Skilled Volunteers: For example, AmeriCorps-VISTA volunteers are skilled individuals from various professional backgrounds. They are usually fast learners and experienced. However, there may be a cost associated with hosting a VISTA volunteer.
3. Senior Corps Volunteers: Retired Senior Volunteer Program (RSVP) are part of a network of national service programs for Americans 55 years and older. This program consists of three primary programs that take different approaches to improving lives and fostering civic engagement. Senior Corps volunteers commit their time to address critical community needs including academic tutoring and mentoring, elderly care, disaster relief support, and more. RSVP volunteers are diverse and experienced. There is a cost associated with hosting one.
4. Community Volunteers: These are individuals, often older adults themselves, who represent the community you serve and may want to become more involved in serving their peers. You get to recruit and hand-select these volunteers from the community. You will have to recruit, train, and supervise these volunteers.

Having a comprehensive plan to recruit, train, and retain volunteers is essential. Here is a promising practice from your peers, a New York City-based SEC, about how they've managed volunteers for their benefits work: [Building Trust through Peer-to-Peer Volunteers](#)

Important Resources

NCOA Resource Library

NCOA has published a series of reports summarizing what several generations of BECs and SECs have experienced when implementing their grants, from challenges to successes with partnerships, outreach, and staffing. In addition, several BECs/SECs have shared their failures with the hope of helping new enrollment centers learn what not to do when setting up their program. Below are links to these materials:

[Learning from Failure: Lessons from the BECs](#)

[MIPPA Resource Center](#)

[SNAP Outreach & Enrollment Tools](#)

[NCOA Senior SNAP Enrollment: Promising Practices Brief](#)

[Reaching Immigrant Populations: Alivio Medical Center](#)

[Benefits Enrollment Centers Network](#)

NCOA Newsletters

To subscribe to NCOA newsletters, visit <https://www.ncoa.org/page/get-involved/> - your email will be held only by NCOA and not used for any commercial ventures. You may unsubscribe at any time.

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Appendix A: Sample Partner Checklist

The following is a checklist of organizational characteristics that could be useful in identifying partner organizations to implement a partner model.

Revolving client base:

- An organization that consistently handles a large caseload may be a suitable partner for short-term projects; however, for continuous outreach and enrollment efforts, a partner should have ongoing access to a wider range of potential enrollees.

Significant contact with the target population:

- Some potential partners may not have much contact with lower-income populations, which could impact their ability to implement this model.

Outreach capability:

- An organization must have the necessary resources, such as staff, time, and outreach materials, in order to conduct outreach effectively.

Leadership Buy-in:

- The buy-in from leadership at partner organizations is crucial as it drives staff motivation and participation.

Trained staff/volunteers:

- Training opportunities should be consistently available as and when needed.

Appendix B: Client Consent Form

Consent to Use Story, Quote, Photograph, or Recording

The undersigned subject of stories, quotes, photographs, recordings, film, or other personal biographical information (collectively “Materials”) hereby grants to the National Council on Aging, Inc., a nonprofit service and advocacy organization located in Washington, DC, including its successors, sponsors, employees, distributors, licensees and assigns (collectively, the “Publisher”), the unrestricted permission, right and license to use the Materials and to reproduce, exhibit, broadcast, advertise and exploit all or any part of the Materials in any media chosen by the Publisher.

The undersigned consents to use of the Materials in any story, quote, photograph, recording or other media produced by or on behalf of the Publisher. The undersigned is aware that the Materials may be published by the Publisher in print or in electronic publications such as on the Publisher’s website(s) and may be released to news media and others in connection with the promotion or publicizing of the activities of the Publisher, including advocacy activities.

The undersigned grants permission to use his/her name or likeness and biographical data in connection with publication of the Materials, and/or the use of his/her personal story or quote under a pseudonym.

The Publisher shall own any copyright and all other intellectual property rights in the Materials. The undersigned waives any demand for compensation and waives any claim to any moral rights or any violation of rights to privacy, publicity or confidentiality under any statute or common law in connection with any use of the Materials.

The Publisher proposes to act in reliance on this Consent, therefore the undersigned declares it to be irrevocable, and releases the Publisher from any and all claims, liability, actions or demands whatsoever in connection with the use of the Materials as provided in this Consent.

Signed _____* Date_____

Name (Please print)_____

Address_____City_____State_____Zip_____

Phone _____Email _____

*Must be signed by a parent or legal guardian in the case of a child under age 18 or legal guardian in the case of an adult (if applicable).

About NCOA

The National Council on Aging (NCOA) is the national voice for every person’s right to age well. We believe that how we age should not be determined by gender, color, sexuality, income, or zip code. Working with thousands of national and local partners, we provide resources, tools, best practices, and advocacy to ensure every person can age with health and financial security. Founded in 1950, we are the oldest national organization focused on older adults. Learn more at www.ncoa.org and @NCOAging.