

# *BenefitsCheckUp® of Colorado:* **Lessons Learned**

*With grant support from:*



Rose  
Community  
Foundation

Evaluation conducted and prepared by JVA Consulting, LLC

## Executive Summary

In June 2001, the National Council on the Aging, with local leadership support from Rose Community Foundation and additional funding from other foundations, launched *BenefitsCheckUp® of Colorado*. This collaborative project helps adults older than 55 determine their eligibility for public benefits programs, such as Medicaid, food stamps and Supplemental Security Income (SSI), and helps them secure those benefits to improve their health and financial stability. Rose Community Foundation, which includes Aging as one of its five program areas, provided substantial start-up and operating funding for *BenefitsCheckUp® of Colorado* consistent with its priorities of helping older adults remain independent and improving information and coordination within the provider community.

At the heart of *BenefitsCheckUp®* is an online screening questionnaire found at [www.benefitscheckup.org](http://www.benefitscheckup.org). The questionnaire asks for basic, non-identifying information about an individual's health, housing, work and financial status. Once completed, the online tool compares the answers given on the questionnaire with eligibility requirements for federal and state benefits programs. The program then generates a list of programs for which the individual may be eligible.

The National Council on the Aging (NCOA), an organization with more than 50 years of experience advocating for older adults, developed *BenefitsCheckUp®* and the screening tool as a comprehensive, "one-stop" database to help individuals find and secure the benefits for which they are eligible. While developing the database, however, NCOA recognized that older



Rose Community Foundation

The mission of Rose Community Foundation is to enhance the quality of life of the Greater Denver Community through its leadership, resources, traditions and values.

Rose Community Foundation's support for the Greater Denver community is focused in five program areas: Aging, Child and Family Development, Education, Health and Jewish Life.

[www.rcfdenver.org](http://www.rcfdenver.org)

### **National Council on the Aging**

Founded in 1950, the National Council on the Aging is the nation's first charitable organization dedicated to promoting the dignity, independence, well-being, and contributions of older Americans.

Through a national, voluntary network of more than 20,000 organizations and individuals, NCOA advocates for older adults and innovates programs and services to help older adults maintain health and independence.

[www.ncoa.org](http://www.ncoa.org)

adults, particularly those among minority and low-income populations, typically have low levels of comfort with computers and the Internet. To promote *BenefitsCheckUp*® and generate best practice models for outreach and connecting older adults with the screening tool, NCOA sought partnerships in various communities around the country. At the project's start, NCOA and Rose Community Foundation's *BenefitsCheckUp*® of Colorado project was one of five such community partnerships across the country.

Since its launch in 2001, *BenefitsCheckUp*® of Colorado has been implemented at more than 40 community-based organizations and government agencies, known as user sites, around the state. Participating organizations and agencies are promoting *BenefitsCheckUp*® to their clients or constituencies, screening older adults for benefits eligibility, and/or providing follow-up assistance by helping individuals apply for benefits. During the first two years of the project, user sites and the state Project Director's office have encountered barriers to implementing the program, but they have developed several innovative solutions to meet the unique needs of Colorado's aging population.

This report documents a process evaluation of the project conducted by JVA Consulting, LLC (JVA) at the request of Rose Community Foundation. Since 1987, Colorado-based JVA has provided strategic planning, program development, grantwriting, evaluation, training and management consulting services to foundation, nonprofit organizations, school districts and government agencies. JVA has worked with Rose Community Foundation since the 2001 launch of the *BenefitsCheckUp*® of Colorado project by researching funding opportunities, writing grant proposals and facilitating strategic planning sessions.

JVA's evaluation focused on the barriers to implementation that user sites faced, the strategies the sites developed to overcome those barriers, and the lessons learned by the user sites during the project. The evaluation methodology included a focus group of executive directors and program managers from eight user sites around the state, individual interviews with executive directors and program managers from 20 user sites around the state, a review of outcome information, and interviews with key project stakeholders, such as the state Project Director and members of the *BenefitsCheckUp*® of Colorado Advisory Council.

This report contains an overview of the *BenefitsCheckUp*® of Colorado project, innovations developed during the project, the observations collected during JVA's evaluation and numerous

examples of strategies for success developed by user sites. **Potential user sites or the developers of model community projects in other states are encouraged to use this report as a guide when developing their own programs.**

Possibly of greatest interest to potential user sites are the **lessons learned**:

- Because of varying literacy levels and language barriers, many older adults need one-on-one assistance during the screening process.
- The benefits listed on reports are limited in scope, so user sites help older adults interpret the reports and provide them with information about programs not listed on the reports.
- Many older adults are not comfortable with the technology used in *BenefitsCheckUp*® and thus require someone to help walk them through the screenings.
- Older adults want assurances that *BenefitsCheckUp*® will not make them vulnerable to invasions of their medical and financial privacy.
- To provide screenings and related services, organizations need increased capacity in the form of additional paid or unpaid staff, more knowledgeable staff, better technology, and the funds to pay for hidden program costs.
- Word-of-mouth is the cheapest and most effective method of promotion and outreach.
- Unique transportation and technology issues were among the hardest obstacles for rural user sites to overcome.

Each lesson discussed in this report includes specific barriers sites faced and the strategies they employed to successfully deliver *BenefitsCheckUp*® to their clients.

Following the report are several appendices designed to help a new site launch its own *BenefitsCheckUp*® program. The appendices include a two-part checklist to help organizations assess their readiness to implement *BenefitsCheckUp*®; a list of the user sites involved in the *BenefitsCheckUp*® of Colorado project as December 31, 2003; sample job descriptions for Community Navigators; examples of promotional materials used in the *BenefitsCheckUp*® of Colorado project; English, Spanish and Russian versions of the questionnaire; a list of members of the *BenefitsCheckUp*® of Colorado Advisory Council as of December 31, 2003; the Council's

bylaws and a copy of the Advisory Council application form; and a copy of Denver Mayor John Hickenlooper's letter of support for *BenefitsCheckUp® of Colorado*.