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## **Community Services Block Grant and the American Recovery and Reinvestment Act State Approaches to Benefits Enrollment and Coordination Activities**

The Community Services Block Grant (CSBG) is a federal grant administered and supported by the U.S. Department of Health and Human Services, Office of Community Services. This block grant funds the anti-poverty operations of a state-administered network of 1,100 local agencies that create, coordinate and deliver programs and services to low-income Americans across the country. The goal of the CSBG is to eliminate the causes of poverty through these local programs that meet the immediate needs of low-income communities and residents for employment, housing, nutrition, education, income security, emergency services and health care while maintaining a sharp focus on the long range goal of economic self-sufficiency.

Nearly every county in the U.S. is served by a CSBG-funded Community Action Agency (CAA). These agencies have a long history of providing coordination and linkage services that identify federal, state, and local benefit programs that can help families break through barriers to their long-term economic security. These services are increasingly needed in the current economy, where many individuals face a worsening economic situation and are unfamiliar with the services and benefits that exist to help them. The CSBG-funded CAAs fill a vital role in linking individuals and families to services that reduce the present strain on family finances and support the household on the path to economic recovery. In structuring the CSBG portion of the American Reinvestment and Recovery Act (ARRA), Congress recognized this broadening need for access to benefit information and demonstrated their confidence in the capability of state administrators, who have managed the CSBG for almost three decades, by setting aside 1%, or \$9.7 million, of the \$970 million CSBG ARRA allocation to focus exclusively on additional benefits enrollment and coordination activities. The remaining 99% was distributed by the states to local CAAs.

This report focuses specifically on the variety of ways that states are using this 1% Benefits Enrollment and Coordination portion of the CSBG ARRA funding to inform people who are encountering economic struggles of the services that are available to them, and to facilitate access to those benefits. It will also examine how they can maintain their effectiveness when CSBG ARRA funding expires.

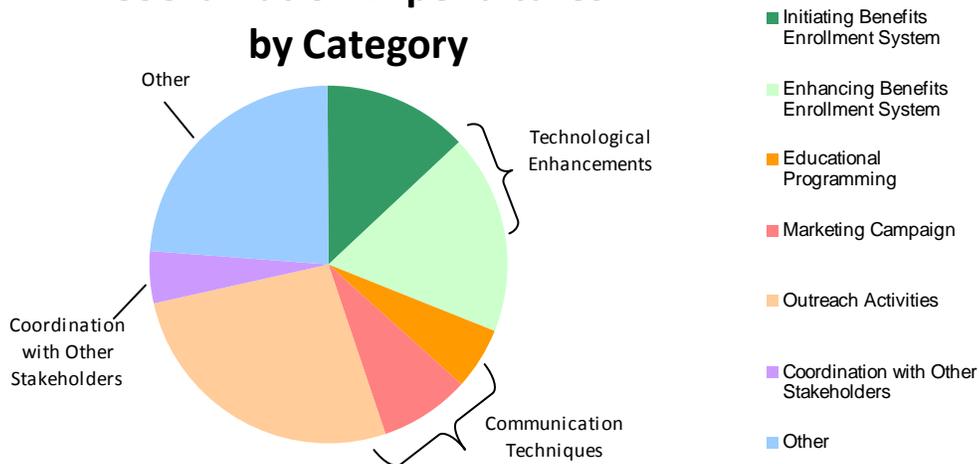
### **The CSBG Network Takes Action**

The nation's 1,100 Community Action Agencies routinely conduct comprehensive needs assessments to determine the service needs and strengths in their community, so that agency services remain focused on local priorities. Through this process, they identify critical gaps in the coordination of services, and among other things obtain an understanding of where they need to strengthen their ability to inform residents of existing programs that could come to their aid in a time of need. Many CAAs are already engaged in 'Linkage' activities that maximize resources

and avoid duplication of service by referring customers to partner organizations which provide complementary services. For example, a customer who arrives at the CAA seeking assistance with an overwhelming utility bill might be linked with a budget counseling service that will help that customer avoid the same issue in the future, or the parent of a participant in the CAA Head Start program might be referred to a volunteer tax preparation service that will help him or her to obtain their Earned Income Tax Credit. A customer who graduates from a CAA-sponsored GED program might be referred to a micro-lending organization to obtain a loan for their fledgling business, or an elderly customer looking for assistance with a rent payment might also be linked to a prescription assistance program that will free their household funds for use in other areas. Nationwide, CAAs report an average of 137 active organizational partnerships, with both public and private organizations, that are used to expand resources and opportunities in their service area. With their successful history of connecting people and resources, the CSBG Network was a natural starting point for states to gather information on gaps in benefits coordination, and on areas where current efforts should be strengthened.

As might be expected from the diversity among states, information from these needs assessments has led state CSBG administrators to follow a variety of paths to improve benefits enrollment and coordination. However, the CSBG ARRA Benefits Enrollment and Coordination initiatives reported by the states can be organized into a few broad categories. The first category includes projects that create or enhance technical resources to expedite information-sharing among providers and enhance the timeliness of the response to customer needs. A second cluster of activities centers on spreading the word on resources that are underutilized, through educational efforts, marketing campaigns, or outreach programs. A third programming area increases coordination by bringing together a variety of stakeholders who may not have interacted in the past. And finally, the unique characteristics of the 52 states and territories are reflected in a group of benefits coordination and enrollment activities that are one-of-a-kind projects particular to individual states.

### CSBG ARRA Benefits Enrollment and Coordination Expenditures by Category



## Texas Ties 211 Together

2-1-1 is a special abbreviated telephone number reserved for public services which provide callers with information and referrals to health and human service organizations, both public and private. 2-1-1 services are typically operated by a private nonprofit community service organization or by a unit of local government; in Texas, 25 independent call centers throughout the state operate the 2-1-1 network. To date, each center has used its own internal call-tracking system – none of which communicates with the systems in use at other locations.

Some call centers are closed evenings and weekends and their service area is covered by larger centers that are open around the clock during these hours. The call centers handling these after-hours calls can't access real-time data on available services in other locations. Since over half of the 2-1-1 calls in Texas are related to emergency rental and utility assistance, this lack of immediate information on available resources can have serious consequences for the customers who need this information.

The need for information-sharing among remote sites isn't a unique problem, and consequently off-the-shelf software solutions that can link multiple sites and allow them to readily share information already exist. Texas is using CSBG ARRA Benefits Enrollment and Coordination funds to purchase one of these off-the-shelf programs as a cost-effective method of improving the current system. This technical improvement will link all 25 call centers and will make real-time information available at any site for all 254 counties of the state. The system will also perform a second important function – it will allow the state to track service requests and to analyze these requests geographically, demographically and by service category. The resulting information can be used to further refine the 2-1-1 system and to determine the need for other improvements in access to, and coordination of, human services across the state. This one-time investment will continue to reap results for many years in the future.

## Oregon Helps SSI/SSDI Applicants Get It Right from the Start

The assessment of need across the state of Oregon highlighted the difficulty that low-income, homeless or disabled individuals have in obtaining benefits through the federal Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) programs. These income benefit programs are meant to assist individuals whose disability prevents them from obtaining paid employment, and in most cases, also provides the individual with health insurance benefits through the federal Medicaid or Medicare program. But the complicated application process can be daunting, and only about a third of applicants are approved on their initial application. A lengthy appeals process puts eligible applicants who initially filed incorrectly into limbo for months, or sometimes years, before their appeal is acted on. For these would-be beneficiaries, a well-prepared, complete and correct application can mean the difference between a secure income and possibly years with no regular means of support.

In an effort to increase the success of disability determinations for eligible Oregonians, a portion of Oregon's CSBG ARRA Benefit Enrollment and Coordination funds are being used to establish a Benefits Specialist Program at four Community Action Agencies. Staff in each of the four locations will receive training, tools and technical assistance that will equip them to prepare successful SSI/SSDI applications on behalf of their clients. The state has solicited proposals for training and technical assistance provision based on the highly successful SOAR (SSI/SSDI Outreach, Access and Recovery) model. Following this model, the selected trainer will provide on-site training in the four CAAs, prepare samples of all forms and data collection instruments needed to support a strong application, and supplement the on-site training with on-line training. The trainer will also establish research tools and data-tracking systems that will enable the agencies to evaluate their success in improving SSI/SSDI approval rates and in decreasing the processing time for applications. The trainer will work with each CAA to build relationships with appropriate partners in each community, including local doctors and clinics, psychologists and the local Social Security office, bringing together new stakeholders to build the network essential to a successful program.

The trainer that was selected to implement this program (Disability Benefits & Training Consulting, LLC) has formerly established and managed a Benefits Specialist Program in a Portland nonprofit, in which homeless or formerly homeless disabled individuals were assisted through the complex application process for SSI/SSDI benefits. That program achieved an 87% approval rate for SSI/SSDI applications, in contrast to the average approval rate of 37%, and shortened the approval period to an average of 46 days. Based on this track record, Oregon CSBG officials expect the CAA staff trained in this methodology to attain an approval rate significantly higher than the average approval rate. In addition to the initial training and on-site assistance, the agencies will be able to request follow-up technical assistance as they implement this effort through the end of FFY 2010. Because outcomes of this program are specifically and readily measurable, the CSBG staff will be able to evaluate the program's success almost immediately.

The state hopes to leverage the initial investment of CSBG ARRA Benefit Enrollment and Coordination funds, and plans to expand on this pilot effort by taking the Benefits Specialist Program to other CAAs in rural Oregon. This pilot effort will create the base for a permanent addition to the technical expertise on SSI and SSDI applications available through Community Action Agencies in Oregon.

### Washington Takes Information to the Customers

In the state of Washington, CSBG officials chose to use the state's CSBG ARRA Benefit Enrollment and Coordination funds to create opportunities to speak directly to low-income, disabled or homeless individuals who might not be aware of all of the resources that are available to them. By co-locating a Benefits Specialist within free tax preparation sites and food banks, they have created opportunities to find customers who are most likely to benefit from these

services. The Benefits Specialists publicized the availability of the Washington Information Network 2-1-1 service (WIN 211) and helped customers identify benefits for which they might qualify. Additionally, the state used the Community Voice Mail network to contact clients who aren't reached at these service sites; information broadcast through this network reaches over 3,700 clients via more than 400 partnering agencies.

Five organizations offering free tax preparation at multiple sites and three food banks were selected as pilot locations for the Benefits Specialist Program. Each of the tax preparation agencies received a \$10,000 grant to hire a Benefits Specialist and to obtain computer equipment and internet access. As individuals came to these sites for tax preparation assistance, they were offered the opportunity to meet with the Benefits Specialist to assess whether they were eligible for any other services. The timing created a challenge, but these sites were up and running in time for the Spring 2010 tax season, thanks to groundwork that had already been laid by one of the participating agencies. Initial feedback from the tax preparation sites is very positive. One agency noted, "The cost of the project was small compared to the amount of visibility it gave to the working poor of the benefits and resources available to them. Calls continued through the tax season and even two months after the last site closed from people who heard about us through the tax site." Another group noted, "Programs were introduced to community members [who] had not, for a variety of reasons, been able to access [them]. Information was distributed and assistance offered to a community group that might not otherwise have known of these services."

Similarly, the three food bank locations each received a grant of just under \$9,000 to place a Benefits Specialist on site. These locations have less of a seasonal clientele, so the pace of referrals is different than that of the tax prep sites, but again initial indications are that the objectives are being achieved. All eight grantees operating the Benefit Specialist Program Pilots report quarterly on client outcomes, and this information will be used to evaluate the effectiveness of the program. Grantees will retain the computer equipment after their ARRA grant ends as a capacity-building strategy.

The tax preparation sites and food banks provide easy access to benefits information for people who come to the site, but co-locating services doesn't offer a means to connect with people who have very peripheral or infrequent contact with their local human services network. To reach this segment of the population directly, the state turned to Community Voice Mail (CVM), a nationwide service that provides access to telephone services for people who would otherwise have none. CVM features a 'broadcast mode' that allows the system to send the same voice mail message to all individual voice mail boxes; with just one call, the service can reach all participants in a specified service area with information about upcoming events and resources. The state used CSBG ARRA Benefit Enrollment and Coordination funds to fund a broadcast message publicizing WIN 211 and explaining how the service can be used to access benefit information. This was a cost-effective approach to reach many potential beneficiaries of existing programs and to assure that the information they receive is accurate and consistent. To assure that WIN 211 has the capacity to absorb the increased volume of calls anticipated as a result of this outreach, the state allocated \$40,000 of CSBG ARRA Benefit Enrollment and Coordination funds to the WIN 211 vendor to enhance the service. Callers will continue to benefit from the 2-1-1 system enhancement well after CSBG ARRA funds have been spent.

## North Dakota Takes a Local Approach

One of the key components of the Community Services Block Grant is the flexibility it provides to state administrators and local agencies, who can tailor services and service delivery to fit the unique circumstances of their state and local communities. North Dakota provides a good example: although the state plan for the CSBG ARRA Benefits Enrollment and Coordination Activities includes publicizing the 2-1-1 program and involves reaching people where they are at, the strategy they have chosen is quite different from that of the states described earlier. Forty-four percent of North Dakota residents live in rural areas, so a strategy that focused on finding participants at major points of congregation would miss a large part of the target audience. Instead, the state chose to create materials describing key points of access to the social service system - like the 2-1-1 Call Center and Community Action Agencies - and to distribute the information as broadly as possible. State CSBG Program staff brainstormed with their colleagues in Community Action to identify methods to get the benefits enrollment information to the most people. Their creative thinking led to some unconventional approaches that the state expects will get information out to a broad swath of the public. The unifying theme: go local.

What do a laundromat, a school lunch program and a church have in common? All of these are avenues for distributing information, and they are among a host of places that the North Dakota CSBG Program will use to get benefits information out. Every laundromat in the state was asked to post a flyer that they received by mail. Elementary and secondary school officials have agreed to include a one-page insert together with their free and reduced-priced school lunch forms; utilities and rural electric coops will do the same with their residential billing statements. Flyers will be included with the food that goes home with children in the Backpack Program and in the Commodities Food Boxes that are distributed to senior citizens. Churches will put the insert into Sunday bulletins and flyers will be handed out at rescue missions, Indian Affairs offices, housing authorities and tax commissioner offices. The flyer is posted online for those who are searching the internet for assistance programs in North Dakota. The state Department of Commerce (where the CSBG Program resides) has partnered with the North Dakota Community Action Partnership (NDCAP) to print reusable shopping bags that will be given to food bank clients statewide – when they reuse the bags, they will become a mobile advertisement for the 2-1-1 service.

In addition to these less-conventional avenues, the state CSBG office is working with NDCAP and the seven CAAs in North Dakota to distribute flyers at meetings attended by agency staff. The broad effort of blanketing the state with information, doesn't lend itself well to quantitative measurement, but NDCAP will compile a comprehensive list of where all outreach materials are distributed. The CSBG Program staff is confident that this approach meets the community needs. Meeting those needs is the highest priority, and as this effort shows, they are willing to go to great lengths to accomplish that goal.

## Illinois Helps Its Heroes

While many states used CSBG ARRA Benefit Enrollment and Coordination funds to disseminate information as broadly as possible, a few states chose to address the needs of special populations that are currently underserved, or that are emerging as a new demographic of individuals in need. By focusing on a narrow demographic, these states chose depth of services rather than breadth of services. In Illinois, the Department of Commerce and Economic Opportunity focused on an underserved population that is a priority for the governor's office, the state's veterans. Each Community Action Agency (CAA) worked together with their area Veteran's Assistance Commission (VAC) to identify needs of local veterans that weren't being met through existing program resources. The CAAs were then able to formulate a local plan of action to meet those needs using CSBG ARRA Benefit Enrollment Coordination funds, with special emphasis on activities that would increase veterans' health and well-being. The flexibility of CSBG funds allowed CAAs to help these veterans in ways they could not be helped before.

Initial feedback from the CAAs indicates that unmet needs were identified in the areas of transportation, dental care, medical care, eye care (eye glasses), emergency assistance (such as rental assistance or food), education and employment. A few services in particular stand out as significant needs identified and addressed in a number of communities. One of these frequently identified needs was dental care. Many VAC clients had no dental insurance and it was not uncommon for these veterans to go without dental care for years; as a result, many had missing teeth and in the worst cases, no teeth at all. By providing dental care to these individuals, the CAAs not only improved the health of many veterans, since they were able to eat better - they also opened up new opportunities in employment for veterans who could once again speak understandably and who could comfortably smile. Anecdotally, the state CSBG Division staff has received reports of beneficiaries whose self-esteem and employment potential increased after they received a pair of dentures or even after getting ordinary dental care that most Americans take for granted.

A second notable area of need is the need for transportation, particularly to the Veterans Administration Medical Centers. Illinois is home to five VA Medical Centers scattered across the state's nearly 58,000 square miles. Homeless veterans, unemployed veterans and veterans living on a limited income find it difficult to afford the cost of private transportation to these facilities, yet the services they needed might only be available in those few locations. A number of CAAs were able to use CSBG ARRA Benefits Enrollment and Coordination funds to provide these needed transportation services.

The CAAs were able to draw on their many existing community partnerships to link veterans who were served in this program with the benefits that met their needs. Many CAAs report that this initiative also opened up new partnerships with their local medical professionals and veteran's organizations that will be maintained with or without a future mandate for benefits enrollment and coordination activities. In Illinois, CSBG ARRA Benefit Enrollment Coordination funds have not only allowed CAAs to help veterans in ways they could not be helped before, they have initiated long-term community relationships that will benefit their customers for the future.

## Delaware Creates Financial Empowerment Centers

CSBG officials in the state of Delaware are using CSBG ARRA Benefit Enrollment and Coordination funds to meet the needs of diverse populations in one venue. They have identified three special populations that can benefit from enhanced assistance in identifying and securing benefits: 1) the increasing number of individuals and households that have traditionally been served by state resources, but that will soon reach the limits of those benefits; 2) the ‘new poor’ for whom economic disruption is a recent and overwhelming experience, and; 3) low-income individuals who currently have access to benefits, but who haven’t connected with resources that can help them move forward to economic security. Delaware residents in each of these groups will benefit from CSBG ARRA-funded improvements to technology and information at the Delaware State Service Centers (DSSC).

The DSSC operates 15 community-based locations, which offer decentralized access to benefits including TANF, SNAP (formerly Food Stamps), child care subsidies, emergency services, and health services, hosting 600,000 visits annually. Over the past year, Delaware expanded the range of services available in the State Service Centers by co-locating an array of asset-building and financial empowerment services in the centers, in partnership with the United Way of Delaware, the local nonprofit community, the University of Delaware, and other corporate and state organizations. The Financial Empowerment Centers will offer free tax preparation, financial coaching, counseling on credit, debt, household budgeting and foreclosure prevention, college planning, assistance with applications to financial aid, and financial planning. The State Service Centers will continue to provide emergency services and public benefits, but as these additional services are integrated into the program mix, service recipients will have a well-supported opportunity to establish their path to economic security. This integrated approach will begin with a pilot effort at five sites over the next 12 months.

Individuals entering any of the 15 State Service Centers will be greeted with a continuous loop video of information on available services and benefits. Clients who aren’t familiar with the Centers can use this as an entry point for information; clients who are arriving with a single purpose in mind will be exposed to information on other programs and benefits that may also be available to them. In addition to the investment in television and programming, CSBG ARRA Benefit Enrollment and Coordination funds are being used to create a “menu” of services, organized to direct an individual along a path from emergency assistance to financial empowerment. This handbook contains information on state programs and benefits which are administered at the State Service Centers, as well as information about the complementary community-based financial empowerment services available to consumers on-site and in each community.

Other uses of CSBG ARRA Benefit Enrollment and Coordination funds include updating brochures on DSSC-specific services and building a new DSSC website that mirrors the agency’s increased focus on long-term economic empowerment. The outreach and improvements to technology and information funded through CSBG ARRA Benefit Enrollment and

Coordination funds will have a positive impact on consumer access and use of DSSC services now and well into the future.

### New York Makes Access Easy

Some states, including New York, Wisconsin and Nebraska, are using the CSBG ARRA Benefit and Coordination funds to enhance their existing online benefits enrollment program, thereby increasing customer access to a range of benefit programs. New York, for example, had already launched MyBenefits, a user-friendly site that was designed to guide individuals through a series of questions to determine programs for which they might be eligible. The site started by allowing users to determine whether they could qualify for state welfare benefits and food stamps. Unfortunately, that's also where it stopped, when the money ran out. The base had been constructed, but this site begged for expansion, and the objectives of CSBG ARRA Benefits Enrollment and Coordination funding meshed perfectly with that need.

MyBenefits was designed to address many of the shortcomings in the existing benefits enrollment system. Program applicants might stand in line for hours, only to find that when their turn came, they weren't eligible or didn't have the right paperwork to prove their eligibility. People with impaired mobility had to cope with issues of transportation and accessibility – and again, might find out that they couldn't be enrolled on the first trip. An individual embarrassed by his current financial status might forego benefits to avoid the stigma of standing in line at the welfare office. An applicant for state welfare benefits might be approved, but she could walk away from the site ignorant of the many other programs for which her income or circumstances might qualify her and her family.

The CSBG ARRA Benefits Enrollment and Coordination funds used to improve MyBenefits provide a means to address all of these barriers to enrollment. By working through the guided questions, potential beneficiaries can determine in advance whether or not they are eligible for assistance. If they are determined to be eligible, they are provided with a list of the information that they must take to the assistance office so their eligibility can be confirmed. The application can be completed in the privacy of their home, on a computer at the local library or in the computer lab run by a neighborhood organization. It can even be completed in one of the 50 MyBenefits kiosks located in many of the county assistance offices and in a few community organizations. If the applicant doesn't have the time to complete the full application, he or she can complete a portion, save it, and then return at a later time to finish it. When caseworkers meet with clients who have already been prepared for their meeting, they spend less time sorting through reams of client information to determine what is relevant and their time is used more efficiently. The result is swifter service, more satisfied customers and a more pleasant environment for both clients and workers.

Applicants who might qualify for programs other than the one for which they are applying will be identified through the program, and will be asked whether they want to apply for additional benefits; the information they have already entered can be used in any additional applications. Currently, the federal SNAP (formerly Food Stamp Program), the New York State Prescription Savers' program, the New York State Gold Star Parents Annuity and Blind Veterans Annuity, Medicaid and Eat Smart New York programs have been, or are being, integrated into the MyBenefits application process. The increased capacity of the site is being activated in stages,

both in terms of adding more programs (the Weatherization Assistance Program and fuel assistance programs are good candidates for future inclusion, for instance) and geographically. The initial roll-out of the expanded site took place in upstate New York. It was announced by way of 30-second radio and television spots, about 10,000 of them paid and an additional 43,000 donated by the participating media. The results have been dramatic and highlight the pent-up demand for this accessibility. For example, follow airing of these spots in the Hudson Valley/Catskills area of upstate New York, applications for assistance there increased 65% and SNAP applications rose by 18%. New York City is the next area linked into the site, proceeding borough by borough and integrating with the city's own ACCESS NYC website. Implementation in downstate New York will begin by November 2010, and every area of the state will be linked into this program by the end of the year.

Radio and television advertisement is one approach to introducing people to the MyBenefits site, but it isn't the only avenue used for outreach. The NY Department of State contracted with the New York State Community Action Association (NYSCAA) to develop and implement a training curriculum that would reach 1,000 community-based workers in Community Actions Agencies and other community-based organizations and make them experts on the use of the MyBenefits site. Training participants get a thorough education on the workings of the site, and emerge with the knowledge they need to respond to any client questions about using the system, as well as with a college certificate. If clients are hesitant to use the online system, these trained workers can explain the benefits, procedure and possible outcomes of using MyBenefits, and if needed, can work side-by-side with an individual until they reach their comfort level with the technology. Additionally, more than 300 child-care sites, volunteer tax preparation sites and emergency food providers received brochures on MyBenefits that they can distribute to their clientele, and more of these sites will be added as the roll-out continues downstate.

The CSBG ARRA Benefits Enrollment and Coordination funds that were used to expand and improve access to the MyBenefits program will continue to enhance services for residents of New York State for many years. The community-based worker training curriculum will continue to be used in venues such as state and regional conferences, and trained workers will also share their expertise with colleagues in their own organizations. The kiosks that allow online access to the MyBenefits site will remain in place. The software that supports the system has been written with expansion in mind and is structured to allow new programs to be added with relative ease. Eventually, New York state would like to see MyBenefits function as the entry point to any federal and state benefits program available to the state's residents. With the use of CSBG ARRA funds, it has a strong start in that direction.

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## **Conclusion**

This Issue Brief has touched on just some of the programming that CSBG ARRA Benefit and Enrollment Coordination funds have engendered. Creative initiatives are being undertaken across the country. In South Carolina, outreach efforts are being coordinated with the State Library and local county libraries so that customers in any county will be able to apply for services online at their local library branch. Some of their funds will be used to purchase

computers for libraries in rural areas, where the equipment isn't currently available. In North Carolina, the state is contracting for development of a business plan that will map a complete path and timeline for the state to streamline enrollment in all means-tested programs. In Oklahoma, the Department of Commerce is collaborating with the Oklahoma Department of Human Services to develop a statewide enrollment system and Vermont is doing the same. In New Hampshire and Minnesota, funds are allocated to improvements in the current information management systems so that applications are streamlined and coordinated across multiple programs. States are funding video productions, pamphlets, posters and all manner of communications materials as outreach tools. Some are taking a broad approach; others have focused on segments of their population in the greatest need – from grandparents raising grandchildren to immigrants and refugees. All of these efforts have a common thread: the states are using short-term CSBG ARRA funding to make a long-term investment in the means to connect available benefits and services with those in need.

*This publication was created by the National Association for State Community Services Programs in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Grant Number 90SQ0048. Any opinions, findings, and conclusions, or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the U.S. Department of Health and Human Services, Administration for Children and Families.*