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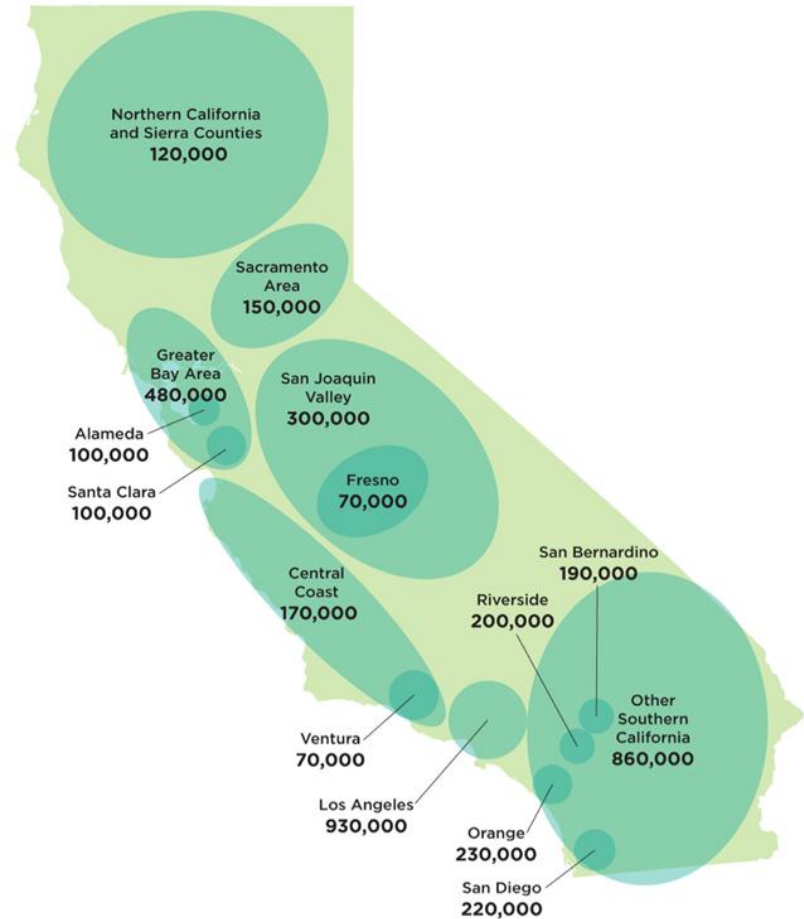
# **Update on the Outreach and Education Grant Program & Stakeholder Feedback**

**Covered California  
December 13, 2012**

# Who Are CA's Uninsured Population?

By Geography:

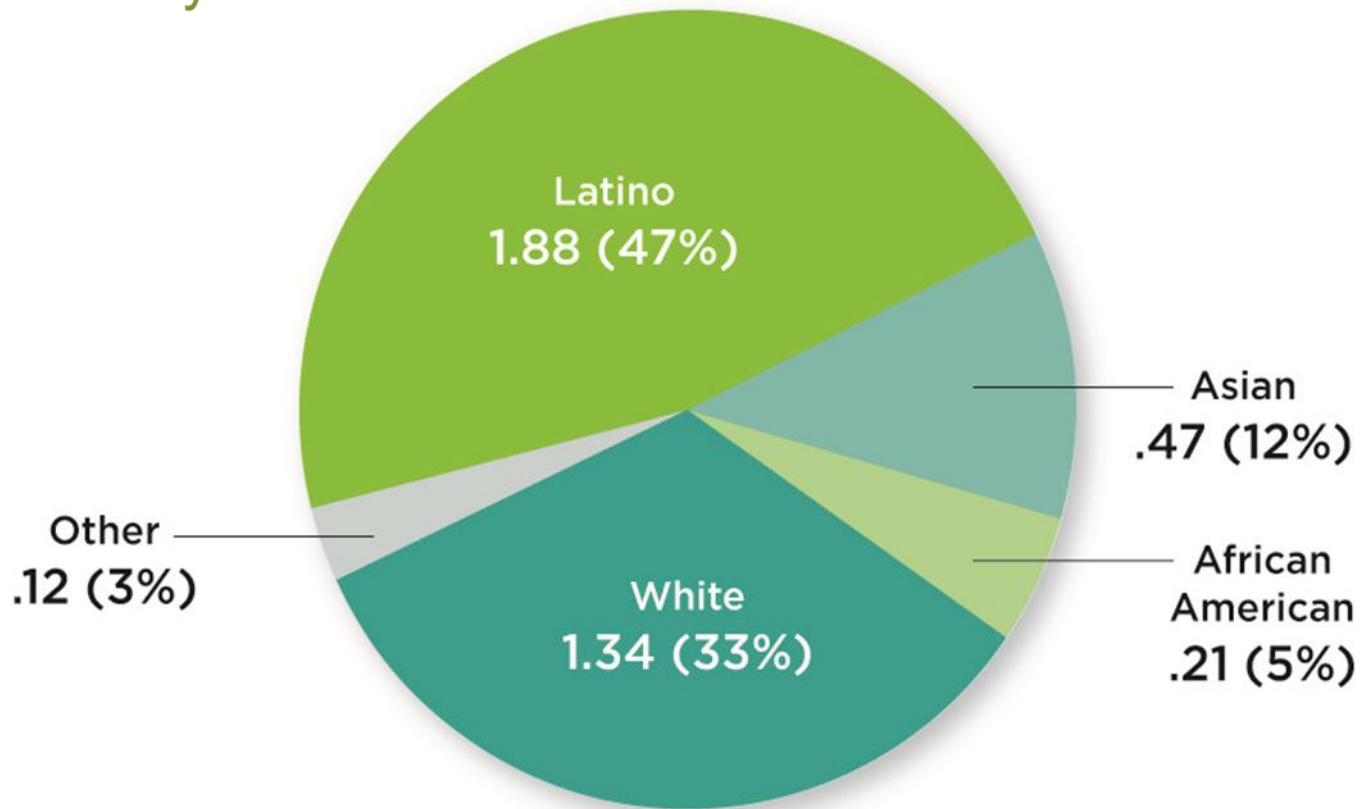
California's geography presents a unique challenge. Our ability to reach the uninsured in urban and rural settings spanning almost 1,000 miles will be critical to the success of this program



# Who Are CA's Uninsured Population?

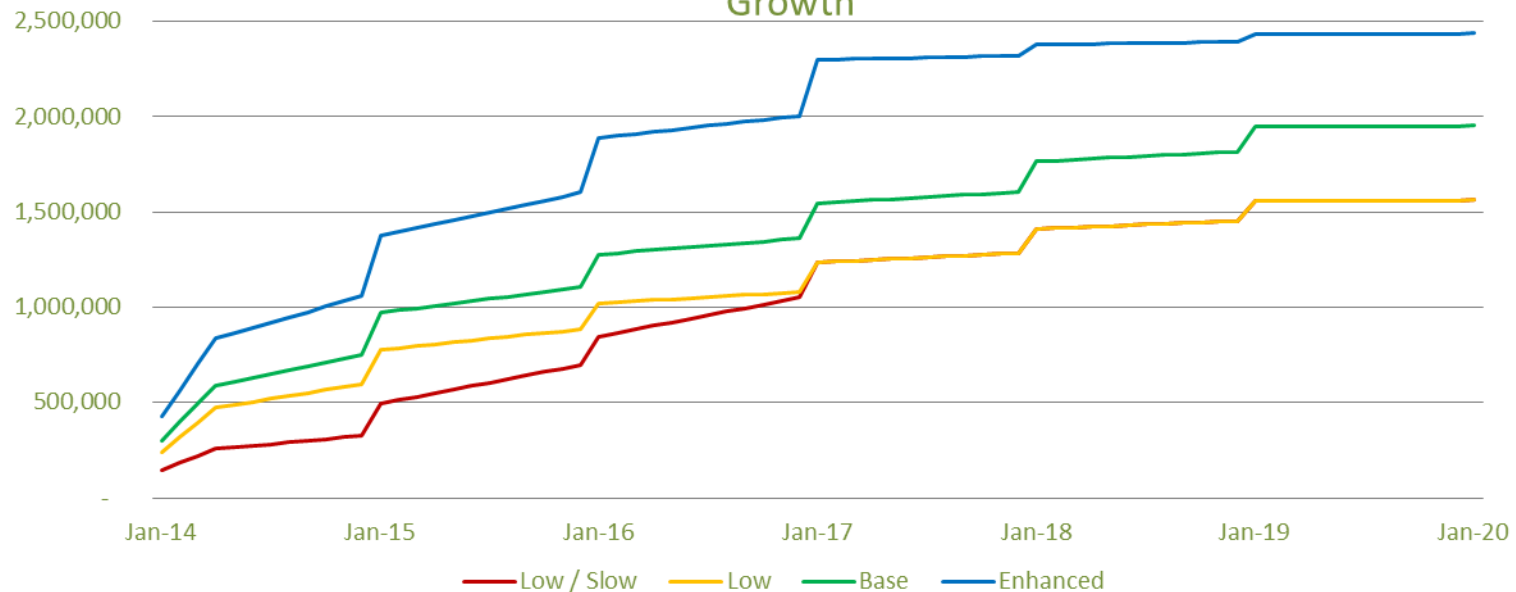
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By Ethnicity



# Covered California Planning: “Shoot High” and Plan for Uncertainty

Exchange Subsidized & Unsubsidized Enrollment Projection Profile and Growth



	Jan-14	Jan-15	Jan-16	Jan-17	Jan-18	Jan-19	Jan-20
Low / Slow	150,000	490,000	850,000	1,240,000	1,410,000	1,560,000	1,560,000
Low	240,000	780,000	1,020,000	1,240,000	1,410,000	1,560,000	1,560,000
Base	300,000	970,000	1,280,000	1,550,000	1,770,000	1,950,000	1,950,000
Enhanced	430,000	1,380,000	1,890,000	2,300,000	2,380,000	2,430,000	2,440,000

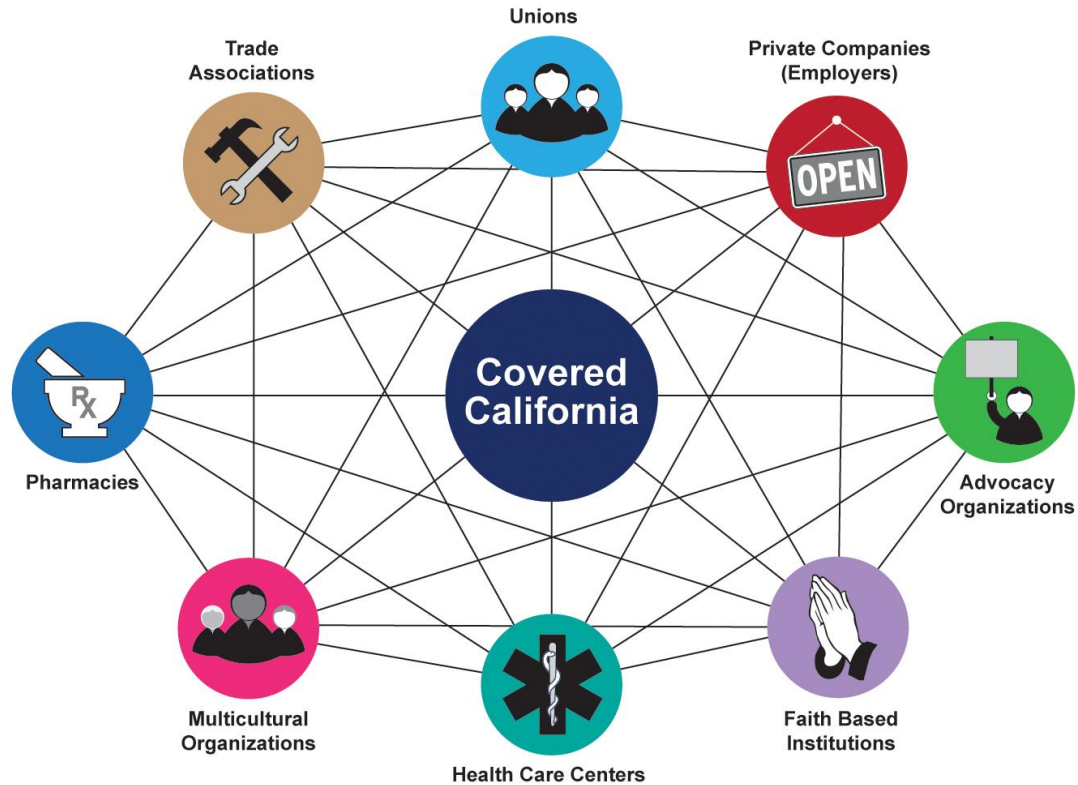
Covered California is seeking to enroll as many Californians as possible. Covered California is working to meet and exceed its goals, while at the same time planning for lower enrollment by developing budgets that can be adjusted and constantly adjusting its marketing, outreach and operations as needed based on new information and experience.

# Agenda

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- Covered California's Community Mobilization Efforts
- Review of Guiding Principles, Goals and Objectives, Program Overview
- Summary of Prior Stakeholder Feedback
- Remaining Key Issues
- Key Dates: Outreach and Education Grant Program
- Next Steps: Stakeholder Feedback

# Community Mobilization At Work



# Assisters Program

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Covered California will operate an Assisters Program whose purpose will be to help individual consumers enroll in Covered California Programs.

- Assisters will be compensated for applications that result in enrollment in a Qualified Health Plan.
- Recruitment for the Assisters Program will begin in the Spring of 2013.
- More details on the Assisters Program will be coming.

# Outreach Network

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*The Community Outreach Network will in essence be the community relations arm of the campaign focusing on local and regional efforts to promote Covered California and drive enrollment into qualified health plans.*

## **Key Role:**

- Fill a gap in the Outreach & Education Grantee network
- Complement but not replace the role of the Outreach & Education Grantee
- Liaison between local leaders and stakeholders and the Outreach & Education Grantees and Assisters
- Local Advocate for Covered California
- Communicate local issues that need to be addressed



# Grant Program Guiding Principles

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- Target resources based on the greatest opportunity to reach the highest number of uninsured and subsidy eligible individuals. Where uninsured and subsidy eligible individuals live, work, play and shop.
- Ensure that all regions and markets in the state, including the hard to move (e.g. rural and limited English proficient populations) are reached.
- Complement the Assisters Program and the broader marketing strategy, including Covered California's Qualified Health Plan marketing efforts.
- Provide consumers and small businesses with information and tools where individuals and employers can enroll on their own.



# Grant Program Main Goal and Objectives

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Goal: Collect leads for Assisters and the Covered California Service Center who will perform application assistance.

1. Ensure participation of organizations with trusted relationships with the uninsured markets that represent the cultural and linguistic diversity of the state.
2. Deliver a cost-effective program that promotes and maximizes enrollment.
3. Disseminate clear, accurate and consistent messages to target audiences that eliminate barriers, increase interest and motivate consumers and small businesses to enroll into coverage.

# Target Populations

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- The primary target population of Covered California's marketing and outreach efforts are the 5.3 million California residents projected to be uninsured or eligible for tax credit subsidies in 2014:
  - 2.6 million who qualify for subsidies and are eligible for Covered California qualified health plans; and
  - 2.7 million who do not qualify for subsidies, but now benefit from guaranteed coverage and can enroll inside or outside of Covered California.

# Potential Grant Funding

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- \$43 million over 2013 and 2014:
  - \$40 million targeting individual consumers qualified for Covered California enrollment.
  - \$3 million targeting small businesses eligible to provide coverage to employees through the Small Business Health Options Program (SHOP).
- Covered California will review future plans for 2015 based on experience and results.
- Initial grant program subject to federal approval of establishment grant request.

# Grant Program Feedback

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- The Exchange presented primary key concepts, at a stakeholder webinar held on September 27, 2012, to solicit feedback on the Outreach and Education Grant Program.
- 32 letters or comment forms were received.
- Overall, comments indicated support for the design with some feedback regarding revisions to key concepts.

# Stakeholder Organizations Submitting Comments

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1. 2-1-1 California
2. AltaMed
3. Asian Pacific American Legal Center
4. California Association of Food Banks
5. California Association of Health Underwriters (CAHU)
6. California Coverage and Health Initiatives (CCHI)
7. California Family Health Council (CFHC)
8. California Labor Federation
9. California LGBT Health and Human Services Network
10. California Pan-Ethnic Health Network
11. California Primary Care Association (CPCA)
12. California Rural Indian Health Board
13. California Rural Legal Assistance Foundation
14. California School Health Centers Association
15. California State Rural Health Association
16. Californians for Patient Care
17. Catholic Charities of California
18. Community Clinic Association
19. Community Health Councils (CHC)
20. Congress of California Seniors
21. Health Access California
22. Inland Empire Children's Health Initiative Coalition (IE-CHI)
23. San Bernardino County Medical Society
24. San Diegans for Healthcare Coverage
25. San Francisco Community Clinic Consortium
26. SEIU California
27. Small Business Coalition
28. Small Business Majority
29. Southeast Asia Resource Action Center (SEARAC)
30. The Children's Partnership
31. United Ways of California
32. Western Center on Law and Poverty



# Stakeholder Feedback: General Support

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- Hybrid Funding Allocation
  - Funding based on number of eligibles; funding to all counties; support of a Special Priorities Fund
- Statement of Work: Deliverables and Outcomes
  - Exchange should establish minimum deliverables
  - Flexibility and innovation in application responses should be allowed
  - Award size based on number of individuals reached
  - Annual Evaluation
  - Measurement of performance critical
- Grant Award Size and Period
  - Range of award sizes
  - Require applicants to develop plans for different phases

# Key Issue #1: Grant Award Size

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## ***Original Recommendation:***

- Offer a range of grant sizes from \$25,000 to \$250,000
- Up to \$500,000 per year - Special Priorities Fund

***Stakeholder Feedback:*** Stakeholders offered a number of recommended changes regarding grant award size. Among the most common themes:

- Increase the maximum for all funding pools; Special Priorities Fund: remove the cap of \$500,000
- Level 1 Priority Fund: large counties up to \$500,000
- Level 2 Counties: increase minimum allocation to \$100,000
- Eliminate grant award sizes all together
- Large counties to apply under Special Priorities Fund
- Maximum funding under Special Priorities to increase
- Increase the allowable overhead up to 20%





# Key Issue #1: Grant Award Size

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## ***Revised Recommendation:***

- Funding pools: Single County and Multi-County Pools and Target Population or Statewide Pool.

Funding Pool	Funding Amount
Single and Multi-County Pool	\$25 million
Targeted or Statewide Pool – for campaigns to target populations NOT defined by geography	\$15 million
Small Business Health Options Program (SHOP)	\$3 million

- Anticipated total funding based on number of eligible populations and include estimated maximum award size per county.
- Increase maximum request to \$1 million; minimum amount is \$250,000.
- Less populated counties or smaller target population (those with less than 5,000 estimated enrollment) are highly encouraged to participate in multi-county initiatives and coalitions.

# Key Issue #2: Number of Applications per Entity

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## ***Original Recommendation:***

- Accept one application per applicant entity. Applicants may only apply as a lead or sub-agency.

## ***Stakeholder Feedback:***

- Concern was voiced over one application per organization. Stakeholders stated that allowing applicants to apply for more than one application would result in a broader range of applications.
- Applicants may want to apply to the two funding pools.

***Revised Recommendation:*** Allow entities to apply as a sub-agency and lead to different funding pools. Entity must reach different target groups, not overlap activities and detail approach in the application. Additional monitoring and quality assurance of grantees will be enforced to prevent duplication of efforts.



# Key Issue #3: Eligible Entities

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**Original Recommendation:** Any organization without a conflict of interest is eligible. Guidelines on eligibility to be provided. Collaboratives/coalitions with sub-agency, and for-profit entities are all eligible.

**Stakeholder Feedback:** Variety of perspectives on eligible entities; requests for specifics and definitions on community foundations and conflicts of interest; several opposed funding of for-profit entities.

**Revised Recommendations:**

- Provide an inclusive list of eligible entities to reduce confusion.
- Provide language and examples of conflict of interest rendering ineligibility.
- Continue to develop a structure for collaboration with Foundations

# Eligible Entities

Organization Type
Community or Consumer-focused non-profit organization; Consumer Advocacy, community-based organization, or faith-based organization
Trade, industry or professional association, labor union, employment sector, Chamber of Commerce targeting specialty populations
Commercial fishing industry organization, ranching or farming organization
Health Care Provider: such as hospital, provider, clinic or county health department
Community College, University, School, or School Districts
Native American tribe, tribal organization, or urban Native American organization
City Government Agency or Other County Agency

# Key Issue #4: Collaboratives and Foundations

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**Original Recommendation:** Collaboratives comprised of lead agency applicant and sub-agency are eligible to submit application to any pools. Consider re-granting pool using community foundations to disseminate funds under Special Priorities funding pool with a required foundation match.

## **Stakeholder Feedback:**

**Collaboratives:** Greater clarity on collaborative/community foundation. Confusion regarding types of funding and distinction between collaborative and re-granting applications. Statewide organizations with affiliate relationships unclear about role. Collaboratives should be considered for re-granting funding pool.

**Re-Granting:** Mixed feedback on benefits and feasibility; support for foundations to match requirement (lower for rural); health care foundations/health reform and rural regional foundations best poised for re-grant funds; increased administrative burden and inadequate access to target areas a concern.



# Key Issue #4: Collaboratives and Foundations

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## ***Revised Recommendation:***

- Updating application to state that Statewide organizations with affiliate relationships can apply under the Targeted or State-wide Pool. The State-wide organization should apply as the lead.
- No foundation re-granting administered through Covered California; but Covered California will actively reach out to foundations to foster opportunities to provide matching program funds. There will be joint review, approval and oversight. Continue to explore opportunities to collaborate with foundations who have an interest in serving the same target population.

# Key Issue #5: SHOP

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**Original Recommendation:** The Outreach and Education Grant Program's purpose is to conduct outreach to uninsured consumers eligible for enrollment through Covered California.

**Stakeholder Feedback:** Stakeholders recommended the inclusion of small businesses for outreach and education; voiced concern about capacity of a single vendor to conduct the outreach and education campaign for SHOP.

**Revised Recommendation:** \$3 million in a separate funding pool has been established specifically for organizations that will target outreach and education activities to small businesses who are interested in providing coverage to their employees through SHOP. These grantees will be separate from grantees targeting individual consumers.

# Key Issue #6: Statement of Work & Outreach Strategy

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**Original Recommendation:** Engaging broad network of grantees; proposed two phases of application cycles to address grant network gaps; Applicants required to propose activities within 3 phases of 2 year grant period; emphasize in-person, one-on-one, high touch educations over low touch.

**Stakeholder Feedback:** Grantees supportive of specifying activities and approved overall approach; require retention and utilization services; paid media prohibited; outreach campaigns should be uniform in structure and accountability; encouraged a broader outreach campaign and how to engage organizations that might perform this work without compensation.

**Revised Recommendations:** Develop a set of allowable, non-compensated activities. Utilization and retention activities are encouraged, but not required or compensated. Specify in the application that grant funds may not be used of paid media. Develop measurable outcomes at the individual and program level as part of the overall outreach and education effort. Align outreach and education activities, performed by the grantee, with the state-wide Marketing and Media Campaign.





# Remaining Key Issues

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## #1 Approach to Outreach and Education

- 70% of time will be allocated towards the delivery of in-depth Education messages designed to provide eligible consumers or small businesses with program information, eliminate barriers, link them to enrollment and assistance resources and motivate them to enroll in coverage.
  - Example: 1:1, small group conversation
- 30% of time will be allocated towards the delivery of brief Outreach messages designed to raise awareness of the opportunities for affordable health insurance offered by Covered California and promoting the value of having coverage.
  - Example: Handing out collateral materials

# Remaining Key Issues

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## #2 Award Criteria

- Recommended Weighted Criteria – Single & Multi-County Pool
  - 50% High geographic density of potentially eligible
  - 25% Approach to conducting O & E, including past experience and references
  - 25% Cost Effectiveness (i.e., asking \$500,000 target pop. 60,000 = \$8.33/person)
- Recommended Weighted Criteria – Target or Statewide Pool
  - 50% Identified as LEP or market segment with high density of potentially eligible
  - 25% Approach to conducting O & E, including past experience and references
  - 25% Cost Effectiveness (i.e., asking \$500,000 target pop. 60,000 = \$8.33/person)

# Grantee Collateral Materials

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**We are requesting stakeholder reaction and feedback on the potential collateral material types/styles which are most effective in reaching target audiences.**

- Brochures
- Tip Cards/Panel Cards/Door Hangers
- Tear off Information Cards
- Business Cards
- Direct Mail Pieces
- Videos
- Buttons/Pens
- Poster
- Tablecloths/Banners

# Stakeholder Feedback Requested

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- Seeking feedback on:
  - Whether there is additional criteria that should be a part of the grantee selection process?
  - What are stakeholders' thoughts and opinions relative to the issues and considerations presented today?
  - What additional factors should Covered California consider?
  - Collateral Material Priority?

# Outreach & Education Grant and Assisters Program Timeline

Date	Activity
<b>2012 - 2013</b>	
December 14 <sup>th</sup> – January 10 <sup>th</sup>	Refinement of Grant Program design and policies based on stakeholder feedback
January 17 <sup>th</sup>	Board presentation on final Grant Program design and policies
January 22 <sup>nd</sup>	Release of Request for Application (Cycle 1), Grant Application Conference date TBD
March 4 <sup>th</sup>	Cycle 1 Grant Application Responses Due
April	In-Person Assisters Program Recruitment Starts
April 26 <sup>th</sup>	Notice of Intent to Award (Cycle 1)
May – August	Grantee Training
May 24 <sup>th</sup>	Cycle 2 Grant Application Release Grant Application Conference date TBD
June	Navigator Program Grant Application
June 24 <sup>th</sup>	Cycle 2 Grant Application Responses Due
July 15 <sup>th</sup>	Notice of Intent to Award (Cycle 2)

# Next Steps: Stakeholder Input

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## Questions and Comments

Submit written comments/suggestions to:

[info@hbex.ca.gov](mailto:info@hbex.ca.gov)

by 5:00pm Friday, January 4, 2013