

California Health Benefit Exchange: Outreach and Education Grant Program Stakeholder Webinar

Sponsored by:

California Health Benefit Exchange

Department of Health Care Services

Managed Risk Medical Insurance Board

Agenda

- Introduction
- Purpose of the Outreach and Education Grant Program
- Goals and Objectives
- Grant Application Timeline
- Guiding Principles
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- Outreach and Education Grant Program Timeline
- Program Specifics
- Key Issues and Considerations

Introduction

The California Health Benefit Exchange (Exchange) anticipates \$40 million in Federal funding to establish and facilitate the Outreach and Education Grant Program over a two year period to include:

- \$20M in 2013 (Level 1.2 Establishment Grant approved 6.5M for period through 6/2013)
- \$20M in 2014 (Future Federal Grant)

The program will engage organizations and entities with trusted relationships with California's uninsured markets to increase awareness and understanding of health coverage options, promote a culture of coverage, motivate Californians to take the next step to enroll and remove barriers to enrollment.

Preliminary Concepts

Purpose of the Outreach and Education Grant Program

- Promote awareness of the benefits of the Affordable Care Act (ACA).
- Provide consumers information and tools where individuals can enroll on their own.
- Complement the broader marketing strategy where specific areas may not be reached (e.g. areas not reached by paid media).
- Complement and build capacity for the Assisters Program.
- Remove barriers to enrollment that keep eligible consumers from applying.
- Drive consumers to Assisters Program resources.

Preliminary Concepts

Goals and Objectives

1. Ensure participation from various organizations with trusted relationships with uninsured markets in the Project Sponsors' approved Outreach and Education Grant Program to be administered during 2013 and 2014.
2. Establish a linguistically and culturally diverse statewide network of outreach and education grantees to target regions and market segments.
3. Deliver a cost-effective program that promotes and maximizes enrollment.

Preliminary Concepts

Goals and Objectives (continued)

4. Ensure the network of grantees will perform the following program priorities, collectively and independently:
 - A. Target outreach and education resources to the counties, employment sectors and organizations with access to market segments with the most opportunity to enroll.
 - B. Access populations with a variety of health status who are eligible for affordable health insurance programs (e.g. Medi-Cal, Healthy Families, and Exchange with subsidies), including the Exchange program without subsidies.
 - C. Deliver culturally and linguistically competent outreach and education messages that respond to the preferences, motivations and challenges of the target market.

Preliminary Concepts

Goals and Objectives (continued)

- D. Employ outreach and education techniques likely to increase awareness of the opportunity to enroll in affordable health insurance in 2014.
- E. Ensure that grantees disseminate clear, accurate and consistent messages to target audiences that eliminate barriers, increase interest and motivate people to enroll in coverage.

Grant Application Timeline

Task	Date
Stakeholder Webinar	Thursday, September 27, 2012
Final Written Comments from Stakeholders Due	Friday, October 5, 2012
Board Review first (1 st) draft of comprehensive Grant Application Process	Tuesday, October 16, 2012
Phase I Grant Application Release	Friday, November 16, 2012
Bidders / Grantees Conference	TBD
Phase I Grant Application Response Due	Friday, January 4, 2013
Announcement of Phase I Awards	Friday, February 15, 2013
Phase II Grant Application Release	Monday, April 1, 2013
Bidders / Grantees Conference	TBD
Phase II Grant Application Response Due	Monday, April 29, 2013
Announcement of Phase II Award	Wednesday, May 22, 2013

Preliminary Concepts

Guiding Principles

- Target resources based on the greatest opportunity where the highest number of uninsured and subsidy eligible individuals can be reached (e.g. targeting 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. “invincibles”), rural and limited English proficient populations are reached through the program.
- Complement the Assisters Program and the broader marketing strategy, including plan marketing.

Grant Program Time Frames

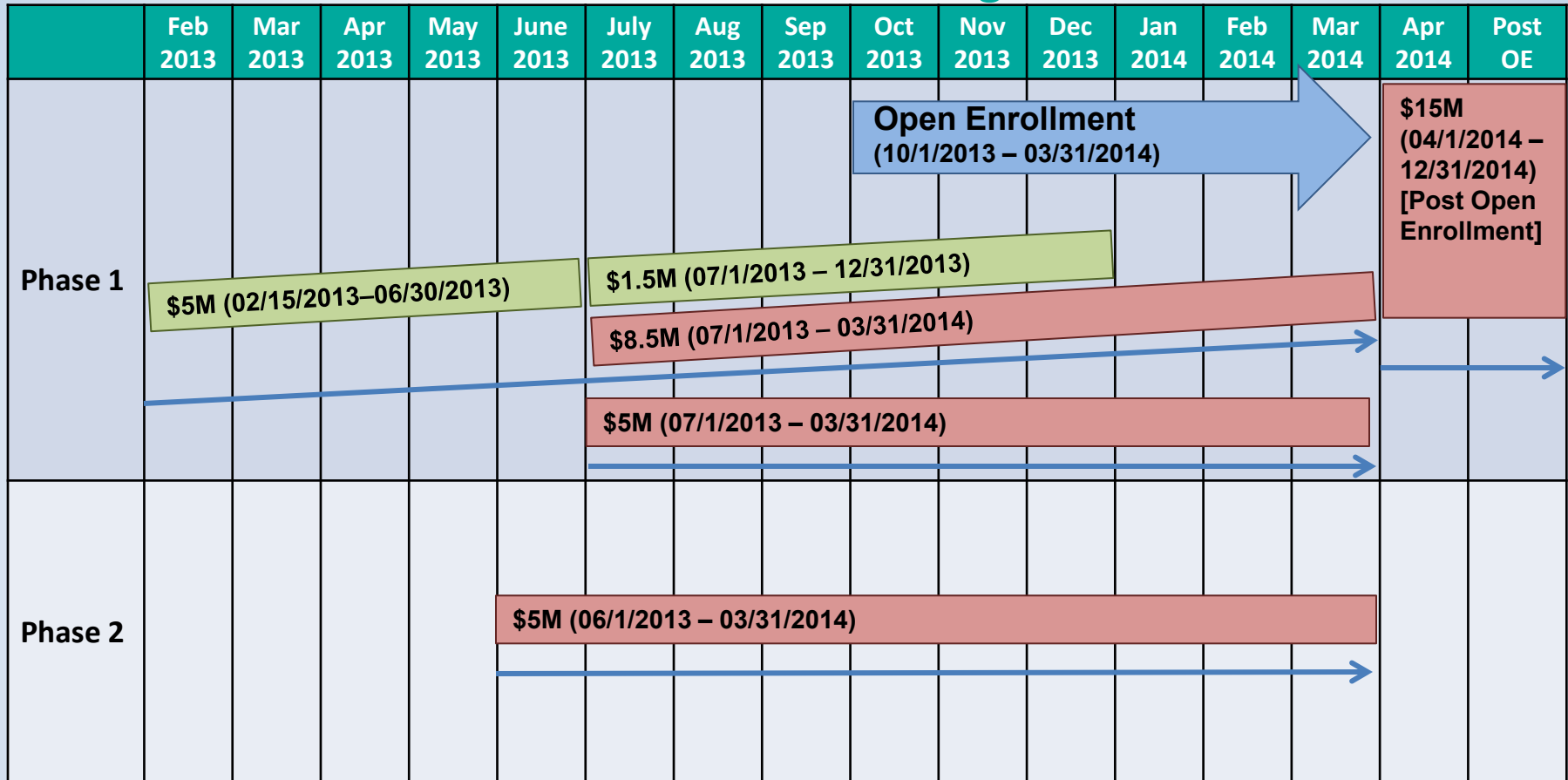
Objective	Time Frame	Maximum Allocation
Awareness – conduct general outreach to inform the public that “It’s coming.”	February 2013 – June 2013	\$5 million dollars
Education – perform more detailed and personalized education on specifics of the new healthcare options and conveying the message, “Get ready, get set, enroll.”	July 2013 – March 2014	\$15 – \$20 million dollars
Retention – perform education and retention activities to promote enrollment and facilitate the retention of first-year participants.	April 2014 – December 2014	\$15 – \$20 million dollars

Recommendations:

- *Grant applicants are required to specify proposed activities for each objective and time frame for which they desire an allocation.*
- *Two year grant period (Feb. 2013-Dec. 2014) with the Grantees option to revise outreach and education plan as needed, or at the request of the State.*

Preliminary Concepts

Outreach and Education Grant Program Timeline



Level 1.2 Establishment Grant : \$6.5M \$5M (02/15/2013 – 06/30/2013) \$1.5M (07/01/2013 – 12/31/2013)

Future Federal Grant : \$33.5M \$18.5M (06/01/2013 – 03/31/2014) \$15M (04/01/2014 – 12/31/2014)

\$40M (Total for 2 Years)

Program Specifics

Awards will be made in two phases:

- **Phase 1:** Most grant funding to be awarded in Phase 1: (\$15 - \$25 million).
 - Program Sponsors may elect to award all funds during this phase.
 - All grant applicants encouraged to apply in Phase 1 for best chance of receiving funds.
- **Phase 2:** Intended to address gaps not awarded in Phase 1 (\$5 - \$10 million).
 - Grant amounts are “up to” amounts and applicant should specify exact funding requested.
 - Awards are made at the sole discretion of the Program Sponsors after a thorough evaluation of grant applications, and are dependent on receipt of federal grant funding.

Issues and Considerations

Outreach and Education Grant Program issues currently being considered include:

1. Funding Allocation
2. Re-granting
3. Grant Award Size and Period
4. Required Grant Activities and Statement of Work
5. Selection Criterion and Process
6. Eligible Entities and Organizations
7. Stakeholder Feedback

Preliminary Concepts

Issues and Considerations (continued)

1. Funding Allocation

Potential Funding Strategy	Potential Approach
<p><u>Geographic:</u> <i>Target by density of uninsured at the County level</i></p>	<ul style="list-style-type: none"> • Allocate a higher amount of funding to geographic areas with the greatest opportunity <ul style="list-style-type: none"> ✓ Priority 1 Counties (20 largest counties) receive a higher allocation of grant dollars ✓ Priority 2 Counties (Remaining counties) receive a lesser amount of grant dollars • Ensure that all geographic areas get a minimum amount of Outreach and Education Grant dollars.
<p><u>Special Priorities:</u> <i>Statewide, Regional, and Non-Geographic Targeted Populations or Re-granting</i></p>	<ul style="list-style-type: none"> • Establish a “special priorities fund “ to target efforts to reach newly eligible groups : <ol style="list-style-type: none"> 1. Regional – multiple counties 2. Targeted Populations (not geographic). Some examples include: <ul style="list-style-type: none"> ✓ Specific occupational sectors experiencing disproportionately high rates of uninsured (e.g. restaurant workers, truckers, construction, etc.) ✓ Specific cultural and/or linguistic groups that are disproportionately represented among California’s uninsured, including hard-to-move communities ✓ Market segments that typically do not see the value of insurance (“invincibles”) 3. Re-granting program with community foundations at the local county or regional level

Preliminary Concepts

Issues and Considerations (continued)

Funding Allocation Recommendation:

Hybrid of Geographic and Special Priorities

- Targets resources to maximize opportunity in locations with the highest uninsured population density.
- Ensures dissemination of grant dollars among all regions and markets in the state, including hard-to-move, rural, limited English proficient and other specialty populations.

Preliminary Concepts

Issues and Considerations (continued)

2. Special Priorities Fund Option: Re-granting

Options	Considerations
<p>Grant to regional or community foundations to disseminate funds to organizations within the target geographic areas as part of the Special Priorities fund.</p> <ul style="list-style-type: none"> Community foundation would provide sub-grantee information and proposed allocations in application. Community foundation would maintain responsibility for the performance and effectiveness of all sub-grantees. Sub-grantees would need to comply with training, monitoring and program standards established by the Project Sponsors. 	<p>Opportunity to Leverage: May include a requirement for community foundations applying for re-granting to match funds (e.g. 50%, 75% or 100%).</p> <p>Cost-Effective Approach: Considering a cap on administrative costs of 15% of the total grant for both grantee and sub-grantee administrative oversight.</p>

Stakeholder Feedback Requested:

Seeking feedback on the benefits, challenges and considerations in developing a re-granting pool as part of the Outreach & Education Grant Program.

Preliminary Concepts

Issues and Considerations (continued)

3. Grant Award Size and Period

Options	Considerations
<p>Offer a range of grant award sizes, that might include:</p> <ul style="list-style-type: none"> • Small Grants: Up to \$25,000 • Medium Grants: Up to \$100,000 • Larger Grants: Up to \$250,000 <p><i>(Up to \$500,000 awards reserved only for special priorities pool that focuses on regional, multi-county, or Statewide Outreach and Education activities including Re-granting).</i></p> <p>(e.g. grant to a collaborative and allow grantee to disperse funding within their collaborative)</p>	<ul style="list-style-type: none"> • Considering Two-Year Awards, with following elements: <ul style="list-style-type: none"> ✓ Work concentrated at open enrollment ✓ Contingent on good performance ✓ Contingent on federal funding approval • Administrative costs. <ul style="list-style-type: none"> ✓ Proposed limit of 10% of total grant award, except for re-granting pool (15%). • Allowing organizations with access to small target markets to participate. • Reaching every region in the state and target markets with limited funding. • Cost-effectiveness of proposed scope of work (i.e. cost per touch).
<p>Allow applicants to establish their proposed budget within their grant size.</p> <p>(e.g. applicants applying for the smaller award could request less than \$25,000)</p>	

Preliminary Concepts

Issues and Considerations (continued)

Grant Award Size Recommendation:

Hybrid

Offer a variety of small, medium, and large grant awards. Offer a range of grant award sizes with the following “up to” amounts:

Small

- \$25,000
- \$50,000

Medium

- \$100,000
- \$175,000

Large

- \$250,000
- \$500,000 (Special Priorities Funding only)

Preliminary Concepts

Issues and Considerations (continued)

4. Required Grant Activities and Statement of Work

Options	Considerations
<p>Allow organizations to propose their own scope of work.</p>	<ul style="list-style-type: none"> • Ensuring that organizations employ methods likely to produce the desired result - increased awareness, decreased barriers and a readiness to act. • Allowing for innovative and creative approaches to reaching diverse markets. • Delivering a cost-effective, accountable and effective program. • Providing accurate, clear and consistent messages and information to consumers. • Ensuring that organizations provide reporting requirements. • Provide guidance relative to minimum reach by grant size.
<p>Mandate specific deliverables per award size and establish allowable outreach and education activities including, at a minimum, the following examples:</p> <ul style="list-style-type: none"> • Providing Information • Checking for Understanding • Call to Action • Ethnic Media Events • Community Events • Distribution of Brochures and Flyers • Consumer referrals to affordable health insurance programs 	

Preliminary Concepts Issues and Considerations (continued)

Required Grant Activities Recommendation:

Hybrid

Provide broad guidelines, minimum deliverables and allow organizations to propose their own specific creative approaches and tactics for reaching their target audience.

Preliminary Concepts

Issues and Considerations (continued)

5. Selection Criterion and Process

Considerations

- Demonstrate experience performing outreach activities.
- Provide access to those counties and markets where the greatest opportunity exists in terms of number of uninsured and eligible Californians.
- Ensure that all regions of the state, including hard-to-move (e.g. “invincibles”), limited-English proficiency and rural populations will benefit from the program.
- Reflect the cultural and linguistic diversity of the target markets.
- Demonstrate the capacity to deliver a cost-effective and evidence-based program likely to result in increased awareness, fewer perceived barriers and ultimately, a commitment to act.

Stakeholder Feedback Requested:

Is there additional criteria that should be a part of the grantee selection process?

Preliminary Concepts

Issues and Considerations (continued)

6. Eligible Entities and Organizations

Options	Considerations
<p>Generally any organization (private or public) without a conflict of interest is able to apply including:</p> <ul style="list-style-type: none"> • 501(c)(3) and non-profit organizations 	<ul style="list-style-type: none"> • Level of access to target markets and ability to leverage resources. • Federal or state guidelines restricting eligibility to receive federal funds. • Alignment of vision, mission and values with the Project Sponsors. • Established relationships with target markets. • Eligibility to become an Assister Entity.
<ul style="list-style-type: none"> • School districts or community colleges 	
<ul style="list-style-type: none"> • Trade, Industry and professional organizations 	
<ul style="list-style-type: none"> • Public agencies 	
<ul style="list-style-type: none"> • Allow specific for-profit companies (e.g. pharmacies, for-profit urgent care clinics) – provided there is no conflict of interest - TBD 	
<ul style="list-style-type: none"> • Allow collaboratives under the coordination of a 501(c)(3) or other public agency 	

Stakeholder Feedback Requested:

Soliciting feedback on which types of organizations provide access to eligible target markets and any organization types with potential conflicts of interest.

Other Issues and Considerations (continued)

7. Stakeholder Feedback

Considerations

- What additional factors should Program Sponsors consider?
- What are stakeholders thoughts and opinions relative to the issues and considerations enumerated above?

Questions/Comments

Submit written comments to:

info@hbex.ca.gov

By Friday, October 5, 2012