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NAVIGATOR GRANT APPLICATION WEBINAR



1. Navigator Grant Program Overview

- Key Attributes
- Program Goals
- Navigator Role
- Grant Award Period
- Funding / Use of Funds
- Eligibility

2. Navigator Grant Request for Application

- Application Criteria
- Collaborative Applications and Use of Subcontractors

3. Navigator Grant Application Process

- Application Schedule
- Grant Application Submission Method
- Letter of Intent to Respond
- Submission Structure
- Narrative Response Section
- Grantee Questions and Clarification

4. Navigator Grant Evaluation and Selection Process

- Evaluation Process
- Selection Criteria



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NAVIGATOR GRANT PROGRAM OVERVIEW



KEY ATTRIBUTES OF THE NAVIGATOR PROGRAM



1. Mandatory requirement of the Affordable Care Act, funded from revenue generated by Covered California.
2. Block grant model with regular timed payments.
3. Total funding not to exceed \$10,000,000 for organizations to assist eligible consumers to enroll and re-enroll in a Covered California Health Insurance Plan.
 - Award up to 80 lead organizations;
 - Grant award period is August 1, 2015 through June 30, 2016;
 - Agreements may be renewed up to two one-year extensions;
 - Conduct outreach, education, enrollment, renewal assistance, and post-enrollment support activities;
 - Majority of enrollment activities will occur during Open Enrollment and Special Enrollment periods.
4. Awards will be in the amounts of \$50,000 to \$500,000.

KEY ATTRIBUTES OF THE NAVIGATOR PROGRAM



CONTINUED

5. Covered California may terminate agreements with Grantees who may not perform as expected.
6. Seeking organizations with an established and trusted presence in the community that has existing relationships with Covered California Health Plan eligible consumers.
7. Applicants must have demonstrated proven experience in consumer outreach, education, enrollment, and post-enrollment support.
8. Lead agencies in a collaborative must also demonstrate sub-contractors also meet the eligibility requirements of this grant.
9. Final grant awards will be at the discretion of Covered California
10. Required to participate in Covered California Sales Regional Field Team efforts.

NAVIGATOR PROGRAM GOALS



- Maximize enrollment and re-enrollment of eligible consumers Covered California Health Insurance Plans.
- Prioritize enrollment, renewal, and post enrollment assistance.
- Engage with organizations that maintain trusted relationships with target markets as defined by geography, employment sector, culture, language, or other shared characteristics.
- Partner with organizations that have the capacity to serve as an integral part of Covered California's service delivery channels.
- Maintain a cost effective grant program, given the \$10 million available in funding.

1. Assist Covered California eligible Consumers successfully enroll and re-enroll in a Covered California Health Insurance Plan.
2. Conduct outreach, education, enrollment, renewal assistance, and post-enrollment support on behalf of Covered California through program activities which include:
 - Informing Covered California eligible consumers of the availability and benefits of obtaining health care coverage;
 - Promoting the value of purchasing health care coverage;
 - Motivating consumers to act;
 - Helping consumers to shop and compare plans;
 - Facilitating enrollment into Covered California Health Insurance Plans;
 - Assisting consumers with the Covered California eligible renewal process; and
 - Providing post enrollment support to Covered California eligible consumers.

GRANT AWARD PERIOD



- The initial grant award period is from August 1, 2015 through June 30, 2016.
- Grants awarded under this RFA will be renewed, upon approval by Board, for two one-year extensions
- During the entire term of the agreement, Grantees will perform outreach, education, enrollment, renewal, and post-enrollment activities.
- The majority of enrollment activities will occur during Open Enrollment and Special Enrollment periods.
- Applications will be evaluated based on the best overall value and most effective enrollment and post-enrollment strategies.

Appropriate Use Of Funds:

- Funding must only be used to conduct the Navigator Program activities and services contained within the Agreement.
- Funds are to be used to perform outreach, education, enrollment, post enrollment, and renewal support to Covered California Health Plan eligible consumers.

Inappropriate Use Of Funds:

- Any acquisitions made with grant funding shall be in compliance with state and federal law.
- The State shall recoup or withhold all or part of a Grantee's funding for failure to comply with the standards set forth in the Standard Agreement upon which the award was based.
- Navigator Program Grant funds shall not supplant federal, state or private funds allocated to conduct the same or similar work contained within the Standard Agreement.

- Covered California has allocated up to **\$10 million** for the Navigator Grant Program
- Will award grant at \$50,000 to \$500,000

Estimated Month of Payment	Payment	% Paid of Award
August - October 2015	20% of award	20%
December 2015	20% of award	40%
February 2016	20% of award	60%
April 2016	20% of award	80%
June 2016	20% of award	100%

NAVIGATOR GRANT PROGRAM ELIGIBILITY



Entities *eligible* for Navigator Grants cover a broad range of organization types including:

American Indian Tribe or Tribal Organizations	Non-Profit Community Organizations
Chambers of Commerce	Ranching and Farming Organizations
Cities, Counties or Local Government Agencies	Resource Partners of the Small Business Administration
Commercial Fishing Industry Organizations	Safety-Net Clinics (including Community Clinics, Free Clinics, FQHC, FQHC Look-Alikes, IHS Direct Services Clinics, IHS 638 Contracting or Compacting Clinics, IHS Urban Indian Health Centers)
Community Colleges and Universities	
Faith-Based Organizations	
Indian Health Services Facilities	School Districts
Labor Unions	Tax Preparers as defined in Section 22251(a)(1)(A) of the Business and Professions Code
Licensed Attorneys (e.g., Family Law Attorneys who have clients that are experiencing life transitions)	Trade, Industry, and Professional Organizations

The following entities are *ineligible* for Navigator Grants:

Any entities or individuals licensed by the Department of Insurance	Licensed Health Care Institutions
Associations that include members of, or lobby on behalf of, the insurance industry	Licensed Health Care Providers
Health insurance issuers or stop loss insurance issuers	Recipients of any direct or indirect consideration from any health insurance issuer or stop loss insurance issuer in connection with the enrollment of any individuals or employees in a QHP or non-QHP
Licensed Health Care Clinics (except for Safety Net Clinics)	



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NAVIGATOR GRANT REQUEST FOR APPLICATION



NAVIGATOR APPLICATION CRITERIA

Highly competitive applications will demonstrate:

- Cost-effective program
- Cultural competency
- Existing access and ability to reach target markets
- Robust infrastructure to support intake, follow-up, enrollments, and post enrollments
- Driving enrollments as the cornerstone of the grantee strategy
- Innovative enrollment events with specific marketing strategies
- Clear understanding of the populations to be targeted during the open enrollment period and the special enrollment period

COLLABORATIVE APPLICATIONS AND USE OF SUBCONTRACTORS

- Covered California will consider collaborative applications.
- Collaborative applications should identify existing partnerships that can demonstrate operational readiness and the ability to meet enrollment goals.
- Collaborative applications should identify a lead organization, and list all other collaborative partners as subcontractors.
- It is the sole responsibility of the Grantee (lead organization) to ensure subcontractors meet the eligibility criteria and follow all other aspects of the Navigator Program.
- Covered California may require lead organizations to submit a copy of their subcontractor agreements prior to executing an agreement with the lead organization.

- If a prospective applicant plans to subcontract any part of this effort, the Grant Application must include the information detailed in Section B.2 - Subcontractor Information of the Grant Application (Attachment 1).
- The applicant must submit Subcontractor Information and Letter of Intent to Participate for each Subcontractor of the proposal (Attachment 2).
- There is no provision for re-granting.
- The use of any subcontractor(s) must be fully explained in the Grant Application (Attachment 1).



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NAVIGATOR GRANT APPLICATION PROCESS



Competitive Application Process which is comprised of several major steps that include:

- Letter of Intent to Respond (Optional)
- Grant Applicant Conference/Webinar (Optional)
- Grant Application Submission (Required)
- Grant Application Evaluation and Selection Process (Required)
- Grant Award (Required)

NAVIGATOR GRANT PROGRAM TIMELINE



Activity	Approximate Date
Release of Request for Application	April 23, 2015
Grant Applicant Webinar with Questions and Answers	May 1, 2015
Letter of Intent to Respond Due	May 8, 2015
Last Day to Submit Inquiries and Questions	May 11, 2015
Response to Questions Posted on Exchange Website	May 15, 2015
Final Application Submission	June 1, 2015
Grant Application, Evaluation and Selection Process	June 2, 2015 – June 30, 2015
Notification of Intent to Award Posted on the Exchange's Website	July 2, 2015
Last Day to Submit Protest	July 9, 2015
Navigator Grant Award Period	August 1, 2015 – June 30, 2016

GRANT APPLICATION SUBMISSION METHOD



- Organizations that submit an application must respond to each narrative question completely, and should not reference other sections of the Application to supplement their responses, as each section will be scored independently.
- Applicants must ensure that their application complies with the instructions contained in this Request for Application (RFA) document.
- Applicants must adhere to the page limits. Additional pages submitted will not be evaluated.
- Covered California will only accept Applications that are submitted electronically. Paper copy submissions will not be accepted.
- Applications must be submitted electronically via email to NavigatorRFA@covered.ca.gov
- Grant applications are due and must be submitted by June 1, 2015 (by 5 p.m. PST). Late submissions will not be accepted or considered.
- Applications must be submitted with all required components as listed in Section B.3 of the application (Attachment 1).

LETTER OF INTENT TO RESPOND



- Potential Applicants should submit a Letter of Intent to the Single Point of Contact identified in Section 3.B.2 of the RFA, by the date and time specified in Section 3.B.1 - Grant Application Schedule. However, the Letter of Intent is optional.
- A list of organizations that have submitted a Letter of Intent will be posted to our Navigator Program Website unless an organization requests otherwise in its letter. The Letter of Intent may be submitted via email or by mail to the Single Point of Contact identified in Section 3.A.
- Organizations are encouraged to send a Letter of Intent if planning to submit an application. Applicants that submit a Letter of Intent will receive updates via email regarding any new program or modifications to the timeline.
- Information and modifications to the timeline will also be posted at: <http://hbex.coveredca.com/navigator-program/>

NAVIGATOR GRANT APPLICATION SUBMISSION STRUCTURE



Covered California will only accept Applications that are submitted electronically. Paper copy submissions will **not** be accepted. Applications must be submitted electronically to NavigatorRFA@covered.ca.gov and must follow the application criteria and submission requirements in the RFA document and outlined online at <http://hbex.coveredca.com/navigator-program/>

1. Cover Letter
2. References -Two Letters of Recommendation
3. Evidence of Eligibility Document –***For the lead AND each subcontractor**
 - a. IRS Determination Letter of your organization’s 501(c)3 or 501(d) status, if applicable
 - b. All entities must provide a Federal Tax Identification Number and any corresponding status determination with your company’s official letterhead.
 - c. All entities must provide the most recent Form 990 or Tax Return.
4. Attachment I -Navigator Grant Application
5. Attachment II -Subcontractor Information and Letter of Intent to Participate (separate document required for each subcontractor), if applicable.

Cover Letter (1 Page Limit):

Include a cover letter (on company letterhead) with the following information:

- Title of this grant Application and submission date of the proposal;
- Funding amount requested;
- A summary of proposed project, including a description of the Covered California eligible population and communities targeted by the project, proposed approach and likely impact; and
- Signature of an individual authorized to enter into contracts on behalf of the proposer.

Qualifications (3 Page Limit)

- Provide a written narrative that demonstrates the applicant meets the minimum desired qualifications identified in the RFA. Order and number your responses as follows:
 1. Provide an overall description of the Applicant's organization for the purposes of providing on-site, walk-in, and appointment-based in-person enrollment assistance. Include a description of the capacity and plans to have a storefront (including hours and address / location) or other public location where consumer assistance will be provided outside of normal business hours.
 2. Describe how the Applicant's established physical sites facilitate access to the communities targeted by this project. If the Applicant is applying as a collaborative lead agency with subcontractors, describe the nature of the collaborative, the mission, qualifications, experience, and role of each partner and established physical sites providing service.
 3. Describe the Applicant's operational readiness to meet enrollment goals during the Open Enrollment and Special Enrollment periods, including the Applicant's program management experience and administrative and fiscal capacity to manage a project of this scope.
 4. Describe and provide examples of the Applicant's ability to ramp up quickly, experience meeting goals in a short time frame and managing subcontractors (if applying as a collaborative).
 5. Describe the Applicant's knowledge of and experience with the Affordable Care Act and Covered California's subsidy-eligible population.

References

- Attach two (2) letters of recommendation from organizations that have successfully collaborated in the past with the Lead Applicant. These letters must be presented on the referring organization's letterhead and contain the name and contact information of the person signing the letter.
- Letters of recommendation from any Subcontractor performing services as part of the Applicant's proposal, or from any entity that might have a financial interest in the Award, **will not** be accepted. The two reference letters are not included in the character limit for this section.
- Each letter should address:
 - The nature and length of the relationship between the entities;
 - The Applicant's strengths and examples of success in similar programs;
 - A statement recommending the Applicant for Covered California's Navigator Program, which focuses on subsidy-eligible population enrollment.

Proposed Personnel (2 Page Limit)

Order and number your responses as follows:

1. Describe the Applicant's strategy for staffing enrollment activities and why this approach is effective in meeting enrollment goals.
2. Describe the Applicant's current staffing capacity to perform the services requested in this grant application and the hiring schedule for additional staff.
3. Describe current staffing capacity of all subcontractors to perform the services requested in this grant application and the hiring schedule for additional staff.
4. Describe how the proposed staffing for this project reflects cultural, linguistic, and other characteristics/preferences of the target populations that the Applicant proposes to serve.

Approach to Statement of Work (2 Page Limit)

Statement of work must address the following:

1. Target Population
2. Strategic Work Plan
3. Approach to Project Management and Quality Assurance

Target Population

- a. Describe how the Applicant assessed the needs of the communities served and how the design of the proposed approach and strategy will meet the needs of the population based on age, ethnicity, culture, language proficiency, income, geography, and other defining characteristics.
- b. Describe the nature of the Applicant's relationship with the communities served, how many consumers are reached annually, and how the Applicant proposes to leverage these relationships for the proposed project.
- c. Describe the Applicant's approach, and the demonstrated ability to eliminate barriers in order to motivate them to enroll in Covered California Qualified Health Plans.

Strategic Work Plan

- a. Describe the Applicant's proposed approach and strategy for maximizing enrollments during the Open Enrollment and Special Enrollment periods.
- b. Describe the Applicant's proposed approach for assisting with renewals and supporting retention efforts.
- c. Describe some proposed enrollment events and the outreach and education strategies that will drive enrollments. Describe the settings and venues where Navigator activities will take place and why these venues are appropriate to reaching the target populations.
- d. Describe the capacity and plans to have a storefront (including days and hours of operation and address locations) or other public locations where consumer assistance will be provided outside of normal business hours.
- e. Describe the Applicant's existing infrastructure and/or relationships that would facilitate the Applicant's ability to address the needs of the target Covered California subsidy-eligible population.

NARRATIVE RESPONSE SECTION



- Covered California strongly encourages cost-effective proposals that are likely to achieve significant enrollment of eligible consumers in Covered California Health Plans.
- Applicants are encouraged, but not required to utilize these figures as guidelines in defining their grant proposals and proposed enrollment and renewal goals.
- Applicants should describe in their proposal barriers in reaching the target population and why the enrollment and renewal goals for that population is different from the thresholds below.

Suggested # of enrollment and renewal goals by grant award:

Grant Size	Enrollment and Renewal Goal (Individuals)
\$50,000	200
\$100,000	400
\$200,000	800
\$300,000	1,200
\$500,000	2,000

Approach to Project Management and Quality Assurance:

- a. Describe the Applicant's project management plan for the proposed project.
 - I. Describe the Applicant's plan for managing and monitoring Navigator Program Activities.
 - II. If the Applicant is applying as a collaborative (lead agency with subcontractors), describe how the lead agency will monitor progress toward accomplishing project goals. Describe any anticipated challenges with managing the collaborative and how the Applicant proposes to overcome them.
 - III. Describe how your organization captures data for the number of consumers assisted and/or enrolled. For consumers who were assisted but not enrolled, is there a follow-up process in place? If so, describe the process.
- b. Describe the Applicant's policies and procedures related to protecting consumer's privacy and security.

SINGLE POINT OF CONTACT



Applicants may only contact the Single Point of Contact as noted below for any matters related to this Grant Application.

Physical Address	Covered California 1601 Exposition Boulevard Sacramento, CA 95814
Mailing Address	Covered California Sales Division, Navigator Program Manager 1601 Exposition Boulevard Sacramento, CA 95814
Email Address	NavigatorRFA@covered.ca.gov

- Covered California will accept written questions or concerns related to this Grant Application and/or its accompanying materials, instructions, or requirements, until the date and time specified in Section 3.B.1 – Grant Application Schedule.
- Organizations may submit questions by completing the Grant Program Question Submission Form, located at: <http://www.healthexchange.ca.gov/navigator-program/> and sending the Form via e-mail or mail, to the Single Point of Contact. The last day to submit inquiries is May 11, 2015 at 5:00pm PST.
- Questions received after the deadline are not guaranteed to be answered. Covered California may, at its sole discretion, post responses to questions at the date and time specified above.



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NAVIGATOR GRANT EVALUATION AND SELECTION PROCESS



NAVIGATOR GRANT APPLICATION EVALUATION PROCESS



The evaluation process will use a 100-point rating based on the following factors:

Section Title	Point Value
Qualifications and References	30 points
Proposed Personnel	30 points
Approach to Statement of Work	40 points

NAVIGATOR GRANT APPLICATION SELECTION CRITERIA



Covered California will thoroughly review responses to this Application and will consider the following:

1. Alignment with the Navigator program objectives;
2. Degree of innovation, including the use of grant funds on store fronts or other permanent locations where consumers can receive enrollment and renewal assistance outside of normal business hours;
3. Experience and demonstrated success in providing enrollment assistance to Covered California eligible consumers;
4. Evidence demonstrating likely effectiveness of outreach, education, enrollment and post-enrollment strategies; and
5. Distinctiveness from other funded activities.



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**DEADLINE TO SUBMIT
INQUIRIES AND QUESTIONS IS
MAY 11, 2015 AT 5 P.M.**

Question Submission Form

<http://www.healthexchange.ca.gov/navigator-program/>

**Application Deadline:
June 1, 2015 at 5 P.M.**

