**OUTREACH AND MARKETING PLAN TO COMMUNITY PARTNERS**

Outreach and Marketing Plan to Community Partners

Regarding Individuals with Disabilities Buy-in

and Adults without Dependent Children

September 29, 2011

1. **Executive Summary**

**Overview**

This report presents the Outreach Plan and the Marketing Plan for the Colorado Department of Health Care Policy and Financing (Department). With the introduction of health care benefits to new segments of the population, a plan for education and outreach has been requested. Outreach will be conducted to community partners regarding the recent expansion populations of Adults without Dependent Children (AwDC) and Individuals with Disabilities Buy-In (IDBI) for Medicaid. Marketing efforts will be directed toward the IDBI segment only at this time.

**Approach**

Developing an effective plan that fits within the given constraints requires a cooperative effort. Insight was sought from program specialists in order to develop a thorough understanding of the programs and their benefits. In addition, research information gathered from past efforts with JSI Research & Training, Inc. was examined and incorporated accordingly into the final plan. The plan was designed so as to utilize a combination of currently available resources, as well as some suggested elements that must be acquired. The Department will conduct educational events, and, produce and distribute targeted materials to both community partners and their client bases. Outreach will be accomplished via meetings, conferences, and with print materials, etc. Marketing will be accomplished through the use of printed materials such as brochures, posters, flyers, etc. Some of the print materials produced will serve dual purposes for both outreach and marketing.

Also included within this plan will be a financial breakdown of the associated costs with consideration given to budgetary constraints.

1. **Situation Analysis**

Colorado’s public health insurance expansions provide an opportunity to ensure that eligible Coloradans are enrolled in Medicaid. The Department of Health Care Policy and Financing and its Outreach division are tasked with performing both outreach to community partners and marketing functions to Medicaid-eligible individuals.

1. **Segment Analysis**

The Department will be conducting outreach and/or marketing to the following segments:

*Community Partners*

As the frontline for the Medicaid application process, community partners need to be well-versed on any updates or additions to the Medicaid program. These organizations, once properly educated, can serve to differentiate between those individuals who are or are not eligible for the programs. The objective with this segment is to prepare them through education. This will be accomplished in the following ways:

* Conduct educational sessions in the form of meeting and conferences lead by Outreach Coordinators and Marketing Specialists
	+ Educational sessions will deal with the specific qualifications, benefits and/or associated costs tied to application and enrollment of both AwDC and IDBI clients
* Produce and distribute informational pamphlets/brochures for distribution to the target segments
* Inform community partners of changes and/or updates to the programs

*Individuals with Disabilities Buy-in (IDBI):*

It is imperative that clients and community partners understand what assistance is available including coverage, and the costs associated with the program. Marketing to this population will be conducted through disability-specific community organizations and other community partners who have previously participated in Department-lead outreach sessions. These organizations will then work with the Department to distribute targeted marketing materials and information to their clients.

*Adults without Dependent Children (AwDC):*

The focus of the Departments efforts regarding the AwDC population will be for educating community partners on the necessary qualifications for enrollment. At this time, there will be no marketing or promotional activities directed toward this population.

1. **Target Audience for Outreach**

Following is a non-comprehensive listing of potential target audiences for the community partner portion of this outreach plan:

|  |  |
| --- | --- |
| * 9Health Fair
 | * Advocacy organizations (Family Voices, CCMU, CCKF, etc)
 |
| * ARC of Colorado
 | * Boys and Girls Clubs
 |
| * Charitable Organizations
 | * Colorado Department of Education
 |
| * Colorado Project WIN
 | * Colorado Veteran’s Association
 |
| * Community shelters
 | * Connect Campaign
 |
| * Denver Options
 | * Department of Labor/Workforce Centers
 |
| * Developmental Disabilities Center (Boulder)
 | * Developmental Partnership
 |
| * Easter Seals Colorado
 | * Family Health Coordinators
 |
| * Health care providers (clinics, hospitals, etc)
 | * Learning Disabilities Association of Colorado
 |
| * Public Libraries
 | * Religious Institutions
 |
| * Schools
 | * Statewide Independent Living Council
 |
| * Vocational rehabilitation centers
 | * YMCA
 |

1. **Target Audience for Marketing:**

At this time the Department will market only to the IDBI segment. A qualified IDBI participant must be:

* a person with a disability
* 16-64 years old, and;
* may have income up to $4,061 per month (or $48,735 per year).

1. **Message Components for Outreach and Marketing:**
* The availability of affordable health care for the IDBI population
* Qualifying for coverage under new criteria
	+ Definition - Adults without Dependent Children
* The option to buy-in to the Medicaid health care plan for certain groups
	+ Definition - Working Adults with Disabilities
	+ Definition - Children with Disabilities

**Standard Language**

The Medicaid Buy-In Program for Working Adults with Disabilities will allow adults who make too much money – or have too many resources – to qualify for Regular Medicaid to receive Medicaid by paying a monthly premium based on their income.

*Eligibility*

* Adults between the ages of 16 through 64, who have a qualifying disability as determined using Social Security Administration (SSA) medical criteria and who are working will be eligible. The Department is currently developing a method by which individuals verify that they are working.
	+ A determination of disability by the SSA will be accepted as proof of disability. If an adult has not been certified as having a disability through the SSA, they

will undergo a separate disability determination conducted by the State’s disability determination vendor. This determination will use the same SSA medical criteria *without* consideration of the individual’s Substantial Gainful Activity (the ability to work).

* There will be no income or resource limit to qualify for this program; however, premiums will be based on a clients’ income. SSI earned income deductions will be applied to an individual’s income before determining premium levels.
* Clients making $75,000 or less per year will pay a monthly premium on a sliding scale. This premium will not exceed (and may be substantially less than) 7.5% percent of their total annual income. Those earning over $75,000 will pay a higher monthly premium that is not subsidized.

*Program Benefits*

Clients enrolled in this Medicaid Buy-In Program will receive Medicaid benefits which include – but are not limited to:

* office visits
* Hospitalizations
* x-rays
* home health services
* durable medical equipment
* prescription medications
1. **Marketing Mix**

Allowing for the task at hand, time considerations and budgetary constraints, it is recommended that the Department utilizes a combination of targeted printed materials in the form of brochures and posters, and, instructional/informational conferences as a means of achieving the marketing and outreach goals.

*Outreach*

Utilizing an approach similar to the Outreach Conferences, perhaps even in conjunction with, to disseminate the new expansion population information. Working together, the Outreach Coordinator/s and Marketing would:

1. Recruit new community partner’s with access to and influence with members of the targeted expansion groups
2. Conduct Department-lead outreach sessions designed to present the new information to both new and existing community partners, and, answers specific questions about application assistance, marketing assistance and procedures, etc.
3. Create a system of follow through and accountability in order to insure that proper information and procedure are being followed by community partners.
4. Provide community partners with necessary program information to pass along to their client bases in print form. (brochures, posters, flyers, etc.)

*Marketing*

1. Design informational brochures, posters, flyers, etc. for distribution to both community partners and Medicaid clients
2. Develop a marketing presentation outlining best practices for explaining and distributing Medicaid materials
3. Create a system designed to channel feedback and present marketing-related questions to Department personnel.
4. Develop formal avenues of communication between marketing, outreach and community partners.

**Financials**

Following are the associated costs that will be encountered as part of the recommend marketing mix.

*Brochures*

These items would serve a dual purpose as both training materials for community partners, and informational materials for potential Medicaid clients. Contained within would be an explanation of benefits, eligibility parameters, and pertinent contact information for assistance, etc. The Department has utilized tri-fold units in the past and these items could be modeled after existing materials. These items would be produced in both English and Spanish. Costs would be incurred for design and production.

*Posters*

These items can be posted in various locations in care of the Departments community partners. As a public display unit they would serve as a conversation starter between community partners and their clients. They will also serve as a call to action for those seeking services. These items would be produced in both English and Spanish. Costs would be incurred for design and production

*Conferences*

Previous success with outreach conferences suggests that a similar approach would be effective for the introduction of the expansion populations. Outreach Coordinators would conduct conferences in strategic locations throughout the state during which time both the education of community partners and the distribution of marketing materials would occur. Travel costs would be incurred. Costs for conferences are based upon similar costs for Outreach Conferences conducted during spring of 2011 as follows:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **LOCATION:** | **Attendee #** | **Outreach** | **Eligibility** | **Total #** | **Est. Cost:** | **Actual Cost:** |
| Pueblo May 2 – 5 | 420 | 113 | 193 | 306 | $15,297.86 | $15,297.86 |
| Greeley May 9 – 12 | 455 | 130 | 160 | 290 | $ 9,350.50 | $ 8,110.75 |
| Grand Junction May 23 – 26 | 400 | 120 | 155 | 275 | $ 7,668.40 | $ 5,114.35 |
| Denver June 6 – 9 | 650 | 300 | 300 | 600 | $16,351.03 | $16,351.03 |
| Durango June 20 – 23 | 100 | 60 | 60 | 120 | $ 6,330.00 | $ 6,330.00 |
| Lamar June 27 – 30 | 160 | 80 | 80 | 160 | $ 3,680.00 | $ 3,680.00 |
| **Conference Total** |  |  |  |  | **$58,677.79** | **$54,883.99** |

Recent conversations with Outreach Coordinators suggest that opportunities for cost-sharing and/or cost reductions may become available through collaborative efforts with the Medicaid Infrastructure Grant (MIG) staff. This idea is still under development at this time.

1. **Estimated Budget**

This section presents cost estimates as supplied by Integrated Document Solutions (IDS) for the production of the various printed items. You will see costs per batch for each item from which specific pricing can be derived. The proposed IDBI and AwDC brochures will be combo units featuring both English and Spanish on one piece of literature. There will be a total of two versions of brochures printed in the required quantities. The proposed posters will have to be printed in English and Spanish separately. There will be a total of four versions of posters printed in the required quantities. See chart.

|  |  |
| --- | --- |
| *Individuals with Disabilities Brochure*500 = $376.001,000 = $398.002,500 = $499.005,000 = $599.0010,000 = $801.00*Adults without Dependent Children Brochure* 500 = $376.001,000 = $398.002,500 = $499.005,000 = $599.0010,000 = $801.00 | *Individuals with Disabilities Poster (English)*500 = $382.001,000 = $419.002,500 = $531.005,000 = $703.0010,000 = $1,046.00*Individuals with Disabilities Poster (Spanish)*500 = $382.001,000 = $419.002,500 = $531.005,000 = $703.0010,000 = $1,046.00*Adults without Dependent Children Poster (English)*500 = $382.001,000 = $419.002,500 = $531.005,000 = $703.0010,000 = $1,046.00*Adults without Dependent Children Poster (Spanish)*500 = $382.001,000 = $419.002,500 = $531.005,000 = $703.0010,000 = $1,046.00 |

Fulfillment, transportation, storage and shipping services can be provided by IDS. Recently an arrangement was established (PO-UHA-CCR11000006 Statement of Work-FINAL), though not engaged, with IDS for similar services regarding the existing outreach materials for the Department. Provided below are the pertinent details for comparative purposes.

Project Objective:

The Colorado Department of Personnel & Administration Integrated Document Services Division of Central Services (DPA-IDS) shall provide the Colorado Department of Health Care Policy and Financing (the Department) fulfillment, transportation, storage and shipping services (Outreach Materials Fulfillment Project) for Application and Outreach Materials ordered by the Department’s Community Partners and Stakeholders.

Work Location:

The work duties shall be carried out at a location to be determined at the discretion of DPA-IDS in deference to its expertise in such matters and the duties enumerated in Section V.

Duties of the Department:

The Colorado Department of Health Care Policy and Financing (the Department) shall perform the following duties and/or activities under this Outreach Materials Fulfillment

Project:

1. Provide stock or inventory of application and outreach materials to be maintained and stored at and DPA-IDS facility;
2. Provide the mechanism by which DPA-IDS will receive the individual orders from Community Partners/Stakeholders that can include E-mail, fax, website submission, etc.
3. Provide answers/content to any frequently asked questions and/or other issues that may arise to assist in providing responses to customer service inquiries.

Duties of the Contractor shall include:

1. Directly receiving orders from HCPF Community Partners/Stakeholders via Department E-mail address and/or website or fax;
2. Compiling order data into database or spreadsheet including all of the information from the current “Materials Order Form for Colorado Health Care Programs” and any changes/updates as needed. This data set shall also include the date the order was received, the date filled/shipped and any shipment tracking information available;
3. Storing printed materials for fulfillment;
4. Maintaining an inventory record of all materials included in the project and include current inventory level totals (including usage and spoilage, if any) to be included with the monthly reporting/billing;
5. Transporting printed materials as required by the Department to and from the DPA-IDS Denver and Pueblo sites;
6. Filling orders placed on a weekly basis, including providing all mailing labels, boxes, packing material, etc.;
7. Shipping orders to Community Partners/Stakeholders via FedEx. Smaller packages may be shipped via USPS if it is determined by its weight that USPS is more cost-effective.
8. Notifying the Department when material stocks need to be replenished in sufficient time to allow for their acquisition;
9. Providing telephone and/or email customer service to answer questions and/or deal with issues/concerns related to the orders of Community Partners/Stakeholders;
10. Reporting (monthly by the 10th day) the orders placed and filled for the previous month.
11. Upon the termination of this purchase order, all Department materials shall be returned to the Department.

Payment:

The total amount of funding for this fixed-price purchase order for all work to be performed pursuant to the Statement of Work is $ 21,000.00.

DPA-IDS shall bill the Department monthly as follows:

Fulfillment costs - $1,200.00 per month (flat rate) for fulfillment services not to exceed $7,200.00;

Storage costs shall be billed $25/monthly per pallet for each full pallet beyond the first two stackable pallets of HCPF Application and Outreach Material stored at its facilities based on the final end-of-month pallet count not to exceed $1,200.00;

Shipping costs: DPA-IDS will charge the Department actual shipping costs of these materials and a handling fee of $5.37 per item shipped the total of all such shipping and handling fees not to exceed $12,600.00. DPA-IDS will provide, as part of the monthly reporting, an itemized list of shipments including the shipping and handling costs and carrier used.

To summarize all budget-related information, and in order to develop an estimation of costs, a baseline of estimated materials to be produced will be based upon past Department utilization.

 IDBI Posters (English) 5000 $703.00

 IDBI Posters (Spanish) 5000 $703.00

 AwDC Posters (English) 5000 $703.00

 AwDC Posters (Spanish) 5000 $703.00

 IDBI Brochures 30000 $2403.00

 AwDC Brochures 30000 $2403.00

 Fulfillment 1 year $21,000.00

 Conferences $58,678.00

 **TOTAL $87,296.00**