

Creating Outreach and Education Events



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Objectives of Session

- To define and describe the importance of assister outreach
- To encourage assisters to discuss and share strategies for creating effective outreach events



Outreach and Education Overview

- Providing outreach and education for consumers is a crucial role of assisters and a required duty for Navigators.
- Outreach and education are important because they:
 - Help consumers understand their options and gain access to affordable, quality health coverage in the Marketplace.
 - Serve as opportunities for assisters to connect with consumers and their community.



Effective Outreach Strategies

To develop your organization's outreach strategy, you should:

- Identify the community you want to reach with an emphasis on the underserved and vulnerable populations.
- Identify resources available to plan your efforts.
- Recognize that effective outreach strategies vary across all organizations.
- Build on your current work and form/foster collaborations.



Effective Outreach Strategies (Cont.)

When identifying your community, ask yourself these questions:

- What are the community's needs?
- What enrollment challenges does the community face?
- What are the community's trusted sources of information and support?
- What resources are already available?



4 Steps for Creating Outreach Events

1. Prepare
2. Advertise in advance of and throughout the Open Enrollment Period
3. Host
4. Follow up with consumers with their prior consent, when applicable



Establishing Trust

An important part of effective outreach and education is establishing trust within your community.

- Begin by identifying and then going to your targeted community(ies).
- Recruit assisters from within the targeted community(ies), engage in community life, distribute contact information, and build connections with the individuals you serve.
- Cultivate your relationship with consumers to extend beyond the enrollment process while complying with any funding prohibitions, if a Navigator grantee.



Identifying Stakeholders

- Many people and organizations have a stake in the health of their communities and are working to increase consumer access to health coverage and services.
- Stakeholders can include, but are not limited to:
 - State governmental partners and Small Business Associations;
 - Community-based organizations;
 - Fishing, ranching, and farmers;
 - Faith-based groups; and
 - Health care service providers.

Building a Diverse Coalition

Benefits of coalition building:

- Connecting with more consumers
- Learning from organizations engaged in similar work
- Creating new strategies and best practices for outreach and education
- Enhancing your credibility in the community
- Increasing consumer awareness of your mission and activities
- Coordinating outreach and enrollment efforts that have greater reach within the community



Collaboration Opportunities

Have you worked with any of these organizations in your community?

- Local realtor association
- Volunteer Income Tax Assistance (VITA) sites and Social Security offices
- Local hospital and clinics
- Recreation centers
- Schools and institutions of higher learning
- Small Business Association
- Other local organizations



Types of Outreach Events



- High-traffic and well-advertised events
- Organizational meetings
- Social media campaigns
- Community events
- Door to door for education and contact purposes only
 - Assistors are prohibited from going door to door to solicit any consumer for application assistance or enrollment and from conducting automated cold calls.

Coordinate Timing

- The most effective outreach and education is carefully planned throughout the year and revised as lessons are learned.
- Develop and align your outreach and education strategy with holidays, seasonal activities, and national health promotion activities.
- For more ideas, visit [Health.gov/news/category/national-health-observances](https://www.health.gov/news/category/national-health-observances).



Outreach Methods and Tools

- Tailor your community outreach efforts by choosing the appropriate tools and resources to convey your message in a culturally accepted and respected manner.
- Different materials work best to convey different types of messages.
- It is important to consider all materials and methods when sharing your message and customizing your outreach.



Learn the Basics & Find Out More

Are the consumers you work with new to the Marketplace or even new to the concept of health coverage?

- To review Marketplace and health coverage basics with your clients, you can share brochures available in multiple languages at [Marketplace.cms.gov/outreach-and-education/value-of-health-insurance-english.pdf](https://www.Marketplace.cms.gov/outreach-and-education/value-of-health-insurance-english.pdf) and [Marketplace.cms.gov/outreach-and-education/about-the-marketplace-english.pdf](https://www.Marketplace.cms.gov/outreach-and-education/about-the-marketplace-english.pdf).
- For additional resources, visit [Marketplace.cms.gov/new-marketplace](https://www.Marketplace.cms.gov/new-marketplace).



Learn the Basics & Find Out More (Cont.)

Are the consumers you're helping already enrolled in Marketplace coverage?

- To help consumers learn how to use their coverage, maintain and renew their coverage, and change their coverage if they experience certain life changes, refer to [Marketplace.cms.gov/outreach-and-education/already-enrolled](https://www.Marketplace.cms.gov/outreach-and-education/already-enrolled).
- To review the basics and share resources with consumers, refer to [HealthCare.gov/why-coverage-is-important/coverage-protects-you](https://www.HealthCare.gov/why-coverage-is-important/coverage-protects-you) and [CMS.gov/About-CMS/Agency-Information/OMH/equity-initiatives/from-coverage-to-care](https://www.CMS.gov/About-CMS/Agency-Information/OMH/equity-initiatives/from-coverage-to-care).

Need more materials to help you educate consumers on Marketplace and other health coverage?

- To order free materials that you can use to help educate consumers, visit [Marketplace.cms.gov/outreach-and-education/need-a-product-order-now.pdf](https://www.Marketplace.cms.gov/outreach-and-education/need-a-product-order-now.pdf).

Learn the Basics & Find Out More (Cont.)

Refer to [Marketplace.cms.gov/technical-assistance-resources/assister-guidance-on-referrals-to-outside-organizations.pdf](https://marketplace.cms.gov/technical-assistance-resources/assister-guidance-on-referrals-to-outside-organizations.pdf) for more guidance including:

- Guidelines and best practices to help assisters understand how to structure these relationships with outside organizations.
- Information about what kinds of referrals may be required.
- Suggested resources for referring consumers.
- Requirements and prohibitions for working with outside organizations.
- Tips for identifying organizations for partnership or collaboration.

Things You Should Know/Helpful Hints



1. Develop your organization's outreach strategy by building on your current work and existing partnerships with the community(ies) you serve.
2. Participate in community life and develop new relationships with community members – social and personal connections are key to connecting with consumers and establishing trust.
3. Customize your message and outreach activities to meet your targeted population's needs.
4. Reach consumers through multiple mediums such as CMS-provided drop-in articles, fact sheets, and other publications.

Things You Should Know/Helpful Hints (Cont.)

5. Partner with local media and businesses that already have an audience in your community to advertise services.
6. Collaborate with other assisters to improve your collective efforts by using their knowledge and sharing your own.
7. Remember to include an education component in your outreach and enrollment events. Consumers' comfort levels increase with knowledge and with greater understanding of the value of health coverage and how it works.
8. Educate consumers about the financial assistance that may be available to them through the Marketplace. Consumers care about cost, and perceived unaffordability is a barrier to enrollment.



Feedback Session

We want to hear from you!



Questions

1. What is the most challenging issue you face when creating an outreach and education event?
2. What is a best practice tip that you have found to be effective when creating outreach and education events?
3. What is the most valuable thing you learned during this presentation?

