**ENGAGING STAKEHOLDERS TO REDUCE MEDICAID CHURN**



 Purpose

This tool is designed to help identify and engage the stakeholders outside of agency staff who can help inform and implement policy and practice changes that can reduce Medicaid churn. External stakeholders such as enrollees, consumer advocates, managed care organizations, and providers will have insights into the drivers of churn and can be important partners in solutions to promoting continuous coverage. The tool will help inform the core team as they consider decisions on who should be engaged, for what purpose, when they should be engaged, and how they should be engaged. As your agency moves through the overall churn reduction strategy process, you can use the tool below to outline, implement, and evaluate a stakeholder engagement strategy.

 Instructions

This planning tool should be completed after the core team has been identified, as a part of conversations with state staff responsible for the development and implementation of policy, eligibility and enrollment processes, including data and technology systems. While this tool should be completed early to identify potential partners who can help in problem identification and solution, it should also be returned to as specific goals and initiatives are defined to ensure stakeholders that can help with those efforts are included. Your team should consider a wide range of stakeholders including those who are affected by Medicaid churn (e.g., enrollees, managed care organizations) and those than can assist with understanding the burden of churn (e.g., researchers, advocates), among others. Examples of the types of stakeholders than can be engaged can be found within this tool; however, additional rows/columns should be added as needed throughout.

**What Is Stakeholder Engagement**

**and Why Is It Important?**

Stakeholder engagement is crucial to the success of any policy and/or practice change initiative. Ensuring that there is stakeholder buy-in and investment in a project requires stakeholders to be involved in the process from conceptualization to implementation. Bringing stakeholders into the process as early as possible greatly reduces the chance for error and ensures that the responsibility for success is shared across multiple entities. Importantly, a commitment to equitable outcomes in reducing Medicaid churn will require additional time and attention to engage stakeholders connected to target populations. For example, if data analysis shows that African American/Black people and rural residents are disproportionately experiencing churn, the Medicaid agency should engage these populations specifically and the entities that serve them.

When engaged intentionally, the right stakeholders can bring invaluable expertise and resources that can determine the success and sustainability of an initiative. There are many initiatives that stakeholders may be engaged in to help reduce churn including, but not limited to:

* Helping to measure the burden of churn within the state and identify disproportionately impacted populations
* Providing feedback on the current renewal process as well as proposed changes
* Sharing lived experiences of Medicaid enrollees to identify system bottlenecks and inefficiencies
* Identifying solutions to address these bottlenecks and inefficiencies
* Leading outreach efforts and assistance to Medicaid enrollees in completing the renewal process
* Sharing resources that facilitate Medicaid renewal with clients

There are many types of stakeholders that can be engaged to support Medicaid churn reduction efforts such as state and local eligibility and policy staff, enrollees, payers including managed care organizations (MCOs), advocacy groups, healthcare providers and their associations, foundations, and community-and faith-based organizations in that serve populations with high Medicaid enrollment. In some cases, the Medicaid agency will have existing and regular contact with stakeholders that can be leveraged in churn reduction initiatives. Where this isn’t the case, the agency should explore opportunities to engage stakeholders at scale such as at a convening of the state’s charity care network.

**Examples of Stakeholder Engagement**

**Efforts to Reduce Churn**

**Example 1: California**

In 2005, the [California Department of Health Services](California%20Department%20of%20Health%20Services) partnered with the California Endowment and the Commonwealth Fund to support research exploring the cost to the state of processing and re-processing applications for children in Medi-Cal (California’s Medicaid program). The study found that California spent an estimated $120 million annually to reenroll children experiencing churn into Medi-Cal.

**Example 2: South Carolina**

In response to the impending end of the COVID-19 public health emergency and the continuous coverage requirement, the South Carolina Department of Health and Human Services (SCDHHS) has partnered with Benefits Data Trust to design and implement a text-recertification campaign aimed at nudging beneficiaries through the Medicaid recertification process. In addition, the state has engaged the managed care plans in this project to aid in the verification of enrollee contact information.

**Stakeholder Engagement Process**

Engaging with stakeholders will look different across several levels based upon factors such as, the existence of prior relationships and the expertise/skillset of the stakeholders. As such it is important to be mindful of engaging people in ways that maximize their talents and roles, minimizes the burden on their time, and clearly articulates how the stakeholder(s) will benefit from the collaboration. In establishing a successful stakeholder engagement process your agency should consider the key steps listed below:

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|  |  **Goal(s) Definition & the Scoping of stakeholder engagement** |
| This is the first step in the planning process. Your agency/team should clearly define how stakeholder engagement aligns/advances overarching churn reduction goals with clear goals and objectives for what your team hopes to accomplish from the engagement and how the time with the stakeholders will be utilized. |



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|  |  **Stakeholder Identification** |
| When deciding whom to engage, and when, your agency/team should analyze, classify and prioritize stakeholders based on expertise, capacity, interest and/or willingness to engage. |



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|  | **Design & Implementation of Stakeholder Engagement Plan** |
| When identifying strategies to engage stakeholders your team/agency should identify the format(s) for engagement (e.g. convenings, focus groups, etc.) based on the information gathered in the previous step. Note that the method of engagement may vary based on the stakeholder being engaged and special consideration should be given to the time commitment being asked of stakeholders |



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| A blue and white logo  Description automatically generated with low confidence | **Evaluation of Engagement Initiatives** |
| Based on the type of engagement strategy your team/agency should establish multiple opportunities to gather feedback on the efficacy of the engagement strategy to ensure the over-arching goals are being achieved. |

Section 1: **Defining Goal(s) and Scoping Stakeholder Engagement**

*This section should be completed for each project initiative to engage stakeholders, such as understanding the impact of churn or developing solutions. It will help articulate who is in charge, what the intended goals are, and what objectives must be met to achieve those goals.*

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| **Stakeholder Engagement Initiative Title:** |       |
| **Agency Leads:** |       |
| *Identify the staff member(s) responsible for ensuring the goal(s) of stakeholder engagement are met)* |
| **Stakeholder Engagement Goal(s):** | 1. **Example:** Understand impact of churn on enrollees and their experiences of why churning happens
2. **Example:** Understand how Medicaid churn impacts managed care organizations
3. **Example:** Identify solutions to address churn-generating problems with the renewal process
 |
| *Identify the overarching goal(s) for stakeholder engagement. Why do stakeholders need to be engaged? What are you hoping to get out of them? The stakeholder engagement goals should be broad and strategic* |
| 1.
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| **Stakeholder Engagement Objective(s):** | 1. **Example:** Work with MCOs to conduct survey of XX enrollees who have experienced churn in the last 12 months by XX date.
2. **Example:** Establish a biweekly meeting series with community advocates by DATE to gather feedback on proposed work.
 |
| *Identify the specific actions needed to achieve the goals articulated above. The objectives should be tangible, measurable and time bound.*  |
| 1.
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Section 2: **Stakeholder Identification**

*This section should be utilized to identify to identify the potential stakeholders your team can engage in churn reduction efforts. It is designed to help articulate the specific contributions they may offer and to identify existing relationships that may be leveraged. Additionally, there is space to consider the barriers that might prevent successful engagement and what can be done to help overcome those barriers. Note that your team may choose not to engage all the stakeholders identified below.*

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| **Group** | **Stakeholder** | **Existing Relationship/ Currently Engaged** | **Primary Point(s)-of-Contact** | **Stakeholder Contribution to Initiative** | **Barriers to Engagement (e.g. lack of resources to participate) and How to Mitigate (e.g. seek foundation support)** |
| Enrollees(e.g. Enrollee Advisory Groups, Member Surveys) | **Name:**       | [ ]  YES [ ]  NO**If YES describe including relationship owner in Agency:**      | **Name:**     **Title:**     **Organization:**      | **Example:** Firsthand experience of renewal process and experts in knowing what churn reduction measures will and will not work for them |       |
| Non-Medicaid Government Agencies and Units (e.g. SNAP agency staff) | **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| Payers (e.g Managed Care Organizations [MCOs], Accountable Care Organizations [ACOs], Dual Eligible Special Needs Plans [D-SNPs], etc.) | **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| Providers (e.g. primary care, provider associations, Federally-qualified health centers (FQHCs), charity clinics, hospital systems, etc.) | **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
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| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| Community Based Organizations(e.g. healthcare navigators, faith-based organizations, advocacy groups, etc.) | **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| Other (e.g. researchers and academic institutions, local foundations, etc.) | **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |
| **Name:**       | [ ]  YES [ ]  NO**If YES describe:**       | **Name:**     **Title:**     **Organization:**      |       |       |

Section 3: **Design & Implementation of Stakeholder Engagement Plan**

*After stakeholders have been identified above, complete the tables below with details on how the stakeholder(s) will be engaged. Note that there may be opportunities to group stakeholders together (as appropriate) and to leverage existing engagement opportunities (e.g., a regular meeting of Medicaid managed care organizations).*

**Group 1**

|  |  |
| --- | --- |
| **Stakeholder(s):** |       |
| **Goals/Objectives for Engagement:** |       |
| *These should map to the overall stakeholder engagement goal(s) above.* |
| **Mode of Engagement:** |       |
| *e.g. in-person convening, monthly virtual call series* |
| **Intended Timing and Duration of Engagement (e.g. when should we engage and for how long?)** |       |
| *Identify the specific actions needed to achieve the goals articulated above. The objectives should be tangible, measurable and time bound.*  |

*Complete the table below by listing the activities that must occur to achieve the goal(s)/objectives listed above. Each activity should have an internal staff lead responsible for ensuring completion and a timeline for completion. You may use the noted column to document factors associated with the activity such as additional staff involved, risks/potential barriers and contingencies.*

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| --- |
| **Key Activities and Timeline** |
| **Activity** | **Internal Lead** | **Milestones/ Deadline** | **Notes** |
|       |       |       |       |
|       |       |       |       |
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**Group 2**

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| --- | --- |
| **Stakeholder(s):** |       |
| **Goals/Objectives for Engagement:** |       |
| *These should map to the overall stakeholder engagement goal(s) above.* |
| **Mode of Engagement:** |       |
| *e.g. in-person convening, monthly virtual call series* |
| **Intended Duration of Engagement**  |       |

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| --- |
| **Key Activities and Timeline** |
| **Activity** | **Internal Lead** | **Milestones/ Deadline** | **Notes** |
|       |       |       |       |
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**Evaluation**

*Ongoing evaluation should be utilized to measure the success of your stakeholder engagement initiative and can be either formal (e.g. surveys) or informal (e.g. conversations with stakeholders). Getting feedback from stakeholders throughout the process can allow for adjustments to be made improving outcomes.*

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| **Group/Stakeholder(s)** | **Evaluation Plan/Strategy** | **Timeline for Evaluation** |
| **Example:** Manage Care Organizations | Survey of MCOs | Fall 2021 |
|       |       |       |

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