



## Key Outreach Activities and Tips

Deciding on the right type of activity for your agency is a crucial part of getting started. Asking the following key questions will help your agency identify the best approach.

- **What resources does your agency bring to the activity?** The type of activity your agency is able to conduct depends on the resources that can be devoted to the project. For example, does your agency have enough funds to pay only for printing flyers or does it have additional financial and staff resources to devote to a more extensive activity?
- **Does your agency have existing activities that can be expanded to include an affordable children's health insurance component?** Examples include health fairs, after-school recreation programs or ongoing partnerships with local schools or non-profit groups.
- **Is another group or agency already providing the outreach or enrollment activity that your agency wants to do?** If so, is there a way your agency can collaborate or contribute to the existing effort to avoid duplicative efforts? Collaboration could include offering use of agency facilities for events or helping with publicity.
- **Does your agency want to limit its activities to simply providing families with information about affordable children's health insurance?** Or does your agency have resources to provide a broader range of activities to help families connect with health insurance for their children?
- **Do the proposed activities fit with what you know about the target population?** For example, if the families your agency wishes to reach have second jobs on the weekend, then holding an enrollment event on a Saturday morning may not work. On the other hand, by making information available at neighborhood community centers where potentially eligible families congregate and making sure that the front-desk staff can respond to basic questions, you may be able to effectively reach your target population.

### Activities

1. Place Information Brochures or Flyers at Agency Buildings.
2. Invite Health Plans to Community Events to Provide Information (and Follow-Up) to Families.
3. Collaborate With Local Non-Profit Organizations and Agencies.
4. Work With an Outside Certified Application Assistant to Help Families Complete the Application.
5. Inform Agency Employees About Potential Health Coverage for Their Children.
6. Assign an Agency Staff Member to Become a Certified Application Assistant.
7. Use Agency Staff as Roving Ambassadors at Agency Events.

8. Hold an Enrollment Event.

9. Collaborate With Schools.

### **1. Place Information Brochures or Flyers at Agency Buildings.**

This is the simplest way to get information about affordable children's health insurance to parents. [Sample brochures and flyers](#) are available on the Online Resource Center for agencies to use for their projects. The brochures and flyers include information about who may be eligible for no- or low-cost health insurance, what is covered, how to learn if a child is eligible and where to go for more information.

They can be adapted for use by agencies, including adding the agency's logo and other locally specific information. It's helpful to give agency staff a brief overview of the health insurance opportunities so that they can answer basic questions from interested families.

The brochure or flyer can either direct the family to a statewide 800 number sponsored by the State of California Department agency that administers the Healthy Families Program (the Managed Risk Medical Insurance Board – also known as MRMIB) or a local non-profit or agency staff person who can assist with follow-up (see [Activity 6](#)).

**Success Tip:** Many families do not know that their children are eligible for no- or low-cost health insurance. Getting the word out to families is essential to making sure eligible children get enrolled.

**Success Tip:** Brochures are best placed at locations where parents regularly visit, such as neighborhood recreation or community centers, libraries, swimming pools and welfare or social services offices.

Consider putting brochures in other local agency locations where parents of potentially eligible children might be contacted. These may include agency offices where individuals obtain permits or licenses to drive a taxi or limousine, in the utility bills of people who signed up for reduced water or energy rates, senior centers where grandparents of potentially eligible children congregate, fire stations promoting fire safety, or locations where families sign up for food stamps or other social services. It may also be helpful to provide public safety staff with brochures and referral flyers to give to families of potentially eligible children.

### **2. Invite Health Plans to Community Events to Provide Information (and Follow-Up) to Families.**

Most local agencies sponsor community events or activities that include exhibitors, such as service organizations, local non-profits, and other community-based organizations. Many health plans are willing to attend these community events and offer information to attendees about children's health insurance options. It's also important to invite the local [Children's Health Initiative](#) if one is operating in your county, as well as the county health or welfare department.

Besides inviting health plans that offer coverage in your community, consider inviting local community clinics, hospitals or other organizations that provide health care assistance. They can offer families information about affordable health insurance and help them complete the application.

**Success Tip:** When inviting health plans, community clinics or others to participate in a community event, be sure to ask them to bring a family referral card as a tool for following up with interested families. The referral cards allow the representative from the health plan or non-profit group to collect the family member's name, telephone number and permission to follow up to provide more information about eligibility and the enrollment process. Using a referral card is a more effective way to help families get the information they need (such as a follow-up phone call to offer enrollment assistance) than just providing an 800 number for them to call. If the participating groups don't bring their own referral cards, be prepared to ask them to use the agency-supplied family referral cards that your agency provides at the event. Plan ahead and have the cards ready to go. Using the referral cards allows your agency and the participating plans or non-profits to be proactive in assisting families. The Online Resource Center has [sample referral cards](#) for agencies to use.

### **3. Collaborate with Local Non-Profit Organizations and Agencies.**

Collaborating with non-profit organizations and others in the community is a great way to extend limited resources, avoid duplication and build new relationships. Many local non-profits offer enrollment assistance services or health care to potentially eligible families and children. For example, ways to collaborate include inviting a non-profit community clinic or Children's Health Initiative to participate in health fairs, placing brochures at neighborhood centers or talking with parents at community events.

A key first step in creating a collaborative partnership involves talking with representatives of local non-profit organizations about what type of joint activities would work best. For example, many non-profits have staff, called Certified Application Assistants (CAAs), who can be helpful to individual cities and counties in their outreach and enrollment efforts. More about CAAs is provided in [Activity 4](#).

**Success Tip:** Invite representatives of the local non-profit organizations to be part of the planning for your agency's activities. This helps to avoid duplication and build working relationships for other joint projects. As one veteran of a successful collaborative outreach effort says, "It's important to leave your egos at the door and work together in the spirit of cooperation."

For more information on how to work with community-based organizations click [here](#).

### **4. Work with an Outside Certified Application Assistant to Help Families Complete the Application.**

Sometimes it's difficult for a family to know whether their children are eligible for affordable health insurance or to complete the application to enroll their children. Certified Application

Assistants (CAAs) are individuals with expertise in navigating the eligibility and application process.

CAAs may be connected with a non-profit community group, may work with health plans or the county welfare or social services department, or be on staff at a hospital or be other city or county agency staff. The key thing to know is that CAAs are trained and certified by the State of California to assist families. Identify CAAs in your area by visiting [here](#).

Having a relationship with a local CAA can be a very effective way to maximize your agency's outreach activities as well as build new relationships with non-profit groups in the community. For example, if families complete referral cards indicating they want more information, the agency can give those cards to the CAA for follow up. Be sure to keep track of the number of referrals the agency gives to the CAA, and ask for follow-up information about the number of children and families enrolled.

Working with CAAs or non-profits who speak other languages is a good way to expand your agency's resources and collaborate to assist families.

Another way to work with CAAs is to offer periodic "office hours" at agency community centers when a CAA is available to assist families. Publicizing the office hours and service offered helps to attract attendees. Your agency staff can also suggest to families who use a community center that the office hour resource is available. Making appointments in advance with families can be helpful.

**Success Tip:** If appointments have been made for a family to meet a CAA during office hours, be sure to call the family one or two days before the appointment to remind them and explain what materials they should bring. Offering transportation assistance can make the difference between a no-show and a completed application.

**Success Tip:** Think about scheduling office hours at times convenient to working families. For example, evening or weekend office hours may be more effective than work-day office hours. Be sure to talk with the CAA about what type of resources are needed, such as computer access, a copying machine and private space for families to talk with the CAA.

## **5. Inform Agency Employees About Potential Health Coverage for Their Children.**

- Don't forget your own agency's employees. Not all employees receive dependent health insurance benefits and, thus, their children may be eligible for affordable health insurance. This is especially true for seasonal or part-time employees. Letting these employees know that their children can get affordable health coverage is an important service local agencies can provide.

Information can be provided to all new employees not receiving dependent coverage when they are hired, as well as to existing employees periodically through their paychecks. [Sample letters and referral cards](#) are available for use by your agency.

This is another opportunity to work with a local non-profit organization or CAA that can help the employees determine eligibility and complete the application process.

**Success Tip:** Be particularly sensitive to your employees' privacy concerns. It's preferable to collaborate with an outside resource so that employees send their requests for information and assistance directly to the outside resource rather than having them send the referral cards to an agency supervisor.

## **6. Assign an Agency Staff Member to Become a Certified Application Assistant.**

Becoming a Certified Application Assistant (CAA) is a relatively easy task – an online training process is [available](#) to simplify the process. In addition, some Children's Health Initiatives or other groups offer workshops to train CAAs.

Having a CAA on staff gives your agency the flexibility to offer direct application assistance to families, which is a helpful service to the community. Having a CAA on staff is a relatively easy service that agencies can provide for families.

**Success Tip:** Don't keep it a secret. Make sure people in your agency know that a CAA is on staff and available to help families. Consider inviting the visit senior centers and libraries to answer questions and assist families.

**Success Tip:** Consider having a bilingual CAA staff member at your agency, especially if the families you wish to reach are predominantly non-English speaking.

## **7. Use Agency Staff as Roving Ambassadors at Agency Events.**

Another good way to connect with families is to have an agency staff person circulate at health fairs and ask parents if they are interested in information about health insurance for their children. This is especially effective when done in community or neighborhood centers setting that residents consider safe places, with trusted staff. Also consider using roving staff to connect with families at community festivals, food closets, movie night at the park or holiday celebrations. Information referral cards can be filled out on the spot, and families can be contacted later for follow-up by a CAA. (For more information about referral cards, see [Activity # 6.](#))

**Success Tip:** Use bilingual staff as roving ambassadors, and match the language with the event attendees.

## **8. Hold an Enrollment Event.**

Another way to reach families with potentially eligible children is to sponsor an enrollment event. These are activities specifically designed so that community members can meet directly with representatives of health insurance plans, CHIs or other qualified individuals to complete the application process and enroll their eligible children in affordable health insurance. If your agency is interested in offering an enrollment event, keep in mind that while enrollment events

can provide families with much needed direct personal assistance, they are **extremely** resource-intensive in terms of staff time, planning, and execution.

It's also important to recognize that it's generally **not** a good idea to simply add an enrollment component to an existing community event, such as a health fair, holiday celebration or parade. However, as noted in [Activity 2](#) and [Activity 6](#), such events offer great opportunities to provide families with general information about children's health insurance options.

There is one exception to the rule about not adding an enrollment component to an existing event — and that is when the families have been previously contacted and have appointments to complete the application process with a CAA attending the enrollment event. For example, one California city successfully added previously scheduled enrollment appointments as a feature of the grand opening celebration at a new community center. The main way to reach individuals at this event, however, was to offer information at tables staffed by the health plans. Interested families were able to ask questions and complete a referral card. The health plan staff then contacted the families after the event to start the application process.

### **Key Steps for Holding A Successful Enrollment Event**

The basic elements of holding a successful enrollment event include the following key steps.

- A. Identify the target audience for the event.
- B. Invite health plans, non-profit groups and others who can assist with enrolling children to participate at the event.
- C. Select a location and time that will be convenient to families.
- D. Let families know about the event using different outreach methods.
- E. Support logistics are important, both for families and enrollment representatives.
- F. Make appointments for families to promote attendance and call with reminders two days before the event.
- G. Collect information about families served.

### **9. Collaborate With Schools.**

There are many ways to work with schools to connect families with affordable health insurance for their children.

**Use existing connections.** In many communities, locally elected city or county officials have existing relationships with school board members, superintendents, or principals. These connections are useful when exploring options for collaboration.

**Use existing school events for outreach.** The school year offers a number of strategic opportunities to connect with parents about affordable children’s health insurance. Examples include Back to School Night, school registration periods, Open House events and other activities that bring parents to school. These are great venues to provide information and encourage families to complete referral cards which can be follow-up by specialists.

**Work through classroom teachers.** Teachers represent the epitome of trusted sources for families and often know which children have health challenges or are uninsured. Information about health insurance options, enrollment events, or opportunities to get more details regarding eligibility can often be brought home to parents through the “back pack” method with the help of teachers. Make sure, though, to involve teachers when deciding what form of school-based outreach to use. [Teachers for Healthy Kids](#), a joint effort of the [California Teachers Association](#) and the [California Association of Health Plans](#), offers an excellent resource for working with teachers and schools.