

# Creating Outreach and Education Events

This job aid provides information and guidance that Navigators and certified application counselors (collectively, assisters) need to know when researching outreach and education opportunities and when creating outreach events.

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Version 2.0. November 2023. This information is intended only for the use of entities and individuals certified to serve as Navigators, certified application counselors, or non-Navigator personnel in a Federally-facilitated Marketplace. The terms “Federally-facilitated Marketplace” and “FFM,” as used in this document, include FFMs where the state performs plan management functions. Some information in this manual may also be of interest to individuals helping consumers in State-based Marketplaces and State-based Marketplaces using the Federal Platform. This material was produced and disseminated at U.S. taxpayer expense.

## Overview

Community outreach involves providing information and services to consumers and connecting with hard-to-reach communities. Providing outreach and education for consumers is a crucial role of assisters. Outreach and education are important because they:

- Help consumers understand their options and gain access to affordable, quality health coverage.
- Serve as opportunities for assisters to connect with consumers and their community.
- Increase awareness about the Affordable Care Act (ACA), including the Marketplaces and requirements for individuals and employers.

Community outreach also provides assisters opportunities to learn from other organizations engaged in similar work.

## Assister Requirements and Best Practices

When conducting outreach and education, assisters and assister organizations must comply with any state and federal laws that may apply to directly contacting consumers. Exhibit 1 lists key requirements that may affect assisters as they work with their communities. Direct contact outreach and education activities may include providing brochures and informational materials about the FFMs, providing information on the annual FFM redetermination process, and informing consumers of application and enrollment assistance provided by your organization.

**Exhibit 1 - Outreach Requirements**

Activity	Requirements
Providing gifts <sup>i</sup>	Gifts and promotional items must be only of nominal value and not purchased with Marketplace (grant or other federal) funds.
Door-to-door and other direct-contact activities	Assisters may conduct outreach and education activities by going door to door or through other unsolicited means of direct contact to help provide consumers with enrollment assistance. <sup>ii</sup>
Robo-calls	Assisters must not call consumers using an automatic telephone dialing system or an artificial or prerecorded voice (frequently referred to as robo-calls) unless the consumer has an existing relationship with an assister or assister organization and other applicable state and federal laws are followed.

## Gifts

“Gifts” are defined in 45 C.F.R. § 155.210(d)(6) as:

- Gift items, gift cards, cash cards, or cash.
- Promotional items that market or promote the products or services of a third party.
- Gifts do not include the reimbursement of legitimate expenses incurred by a consumer to receive Exchange application assistance, such as travel or postage expenses.

## Allowed Uses of Gifts

It is permissible to use grant funds for Promotional items/Gifts/Gift Cards **as long as**:

- Promotional items/Gifts/Gift Cards costs are \$15 or less per consumer and in the aggregate (that is, multiple promotional items are ok as long as they total \$15 or less);
- They cannot be used to induce QHP or non-QHP enrollment (by induce enrollment, we mean conditioning receipt of the gift(s) on a consumer actually enrolling in coverage);  
**AND**
- They don't market or promote a third party.

For more detailed information about assister requirements when conducting outreach, refer to [CMS.gov/marketplace/technical-assistance-resources/conflict-of-interest-requirements.pdf](https://www.cms.gov/marketplace/technical-assistance-resources/conflict-of-interest-requirements.pdf) and [CMS.gov/marketplace/technical-assistance-resources/assister-dos-and-donts.pdf](https://www.cms.gov/marketplace/technical-assistance-resources/assister-dos-and-donts.pdf).

## Building a Successful Outreach Strategy

When creating an outreach strategy, assisters should consider the different populations of consumers in their community with an emphasis on the underserved and vulnerable populations and then identify the best ways to reach and help them. Program evaluation is essential to identify the most effective strategies and help assisters and assister organizations build on best practices for improving future outreach efforts.

## Community Collaboration

Many entities have a stake in the health of their communities and are working to increase consumer access to health coverage and services. Stakeholders can include:

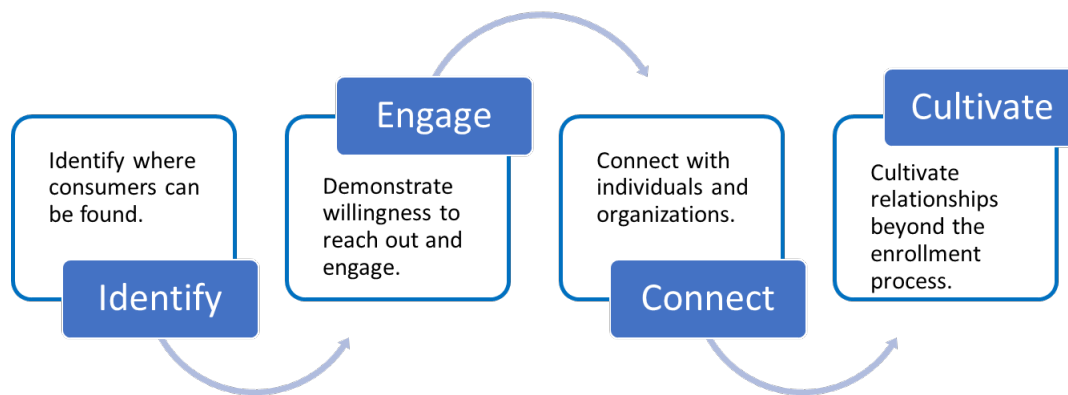
- State governmental partners and Small Business Associations
- Community-based organizations
- Fishing, ranching, and farmers
- Faith-based groups
- Healthcare service providers

Assisters should consider working with these and other stakeholders in their communities to identify and reach consumers for education and outreach. When developing an assister organization's outreach strategy, assisters should identify the specific communities they want to reach and the resources available to plan their efforts, recognizing that effective outreach strategies vary across all organizations. Assisters should also consider building on their own current work to form and foster collaborations. Before beginning outreach efforts, assisters should answer the following 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?

An important part of effective outreach and education is establishing trust within the assister organization's community. The outreach process should 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. If designed effectively, outreach will be ongoing and extend beyond the enrollment process. Exhibit 2 provides an overview of the continuous process for building and maintaining a community's trust.

**Exhibit 2 - Building a Community's Trust**



Refer to [CMS.gov/marketplace/technical-assistance-resources/assister-guidance-on-referrals-to-outside-organizations.pdf](https://www.cms.gov/marketplace/technical-assistance-resources/assister-guidance-on-referrals-to-outside-organizations.pdf) for guidelines and best practices when working with outside organizations.

## Types of Outreach Events

Assisters should tailor their community outreach efforts by choosing the appropriate tools and resources to convey their message. Different materials work best to convey different types of messages. It's important that assisters consider all materials and methods when sharing their message and customizing their outreach.

The most effective outreach and education is carefully planned throughout the year. Assisters and assister organizations should develop and align outreach and education strategies with holidays, seasonal activities, and national health promotion activities. Exhibit 3 lists a variety of outreach ideas.

**Exhibit 3 - Outreach Ideas**

Types of Activities	Examples
Face-to-face Outreach	<ul style="list-style-type: none"> <li>▪ Distributing brochures and fliers</li> <li>▪ Presentation</li> </ul>
Media	<ul style="list-style-type: none"> <li>▪ Social media campaigns/digital (web) outreach</li> <li>▪ Press releases</li> <li>▪ Participating in radio programs and conducting live interviews</li> <li>▪ Including information about health coverage in a state's energy assistance program mailing</li> <li>▪ Local newspapers</li> <li>▪ Newsletters</li> </ul>
Local Partnerships*	<ul style="list-style-type: none"> <li>▪ Community centers</li> <li>▪ Libraries</li> <li>▪ Realtor association</li> <li>▪ Volunteer Income Tax Assistance (VITA) sites</li> <li>▪ Hospitals</li> <li>▪ Recreation centers</li> <li>▪ Schools and institutions of higher learning</li> <li>▪ Local businesses and small business association</li> <li>▪ United States Department of Agriculture (USDA) Extension programs</li> </ul>
High-traffic activities	Set up tables at community events to pass out information, talk to consumers, and advise them of the services the assister organization provides to the public.

\*When an assister asks others to distribute materials created by HHS, HHS's authorship of the materials must be disclosed.

## Track, Monitor, and Evaluate

Tracking, monitoring, evaluating, and refining community outreach efforts will:

- Help assisters know if their plan is working.
- Examine the effects of their outreach in the community.
- Assist in better identifying the needs of key audiences.
- Ensure assisters are spending resources (including time) in the right way.
- Identify the most effective strategies and help assisters build on the best practices.
- Provide information to improve assister outreach efforts.

Some key ways to track, monitor, and evaluate assisters' outreach efforts are to:

- Collect information on the number of consumers assisters interact with each month and during each outreach event.
- Compare which outreach events are most effective at reaching key audiences.
- Ask consumers how they learned about outreach events and record their responses, then use this information to improve outreach strategy at future events.
- Ask consumers how they learned of the organization. Keep a contact log of calls from consumers.

Remember, personally identifiable information (PII) collected from the consumer – including name, email address, telephone number, application ID number, addresses, or other notes – must be stored securely. For more information on working with consumers' PII, refer to the [Obtaining Consumer Authorization and Handling Consumers' PII in the FFM assister webinar at CMS.gov/marketplace/technical-assistance-resources/consumer-authorization-and-handling-pii.pdf](https://www.cms.gov/marketplace/technical-assistance-resources/consumer-authorization-and-handling-pii.pdf).

Evaluating outreach results will help assisters refine plans and strengthen their ability to reach the intended audience.

## Working with Vulnerable and Underserved Populations

Consumers who are considered vulnerable and underserved may experience barriers that make it difficult to get health coverage and basic health care services, and outreach to these populations may require special considerations. A pillar of the Center for Medicare & Medicaid Services' (CMS) 2022 strategic plan is to advance health equity to address the health disparities that underlie our health system. One health equity goal is to build on outreach efforts to enroll

eligible people across Medicare, Medicaid, the Children's Health Insurance Program (CHIP), and the Marketplace.

Assisters can best help vulnerable and underserved consumers by:

- Identifying who may be vulnerable and underserved.
- Considering their specific needs when informing them about how to access coverage and promote culturally and linguistically appropriate services.

An assister's primary goal is to earn these communities' trust. Communication methods that work well with one community or individual within a community may not necessarily work well for other communities or individuals. Therefore, assisters should tailor their community outreach efforts by choosing the appropriate tools and resources to convey their message in a culturally accepted and respected manner. For example, if consumers have low health literacy, they may be new to the Marketplace or new to the concept of health coverage in general. Outreach materials may need to focus on first reviewing the basics with them. To find additional resources like these, refer to [CMS.gov/new-marketplace](https://www.cms.gov/new-marketplace) and [HealthCare.gov/why-coverage-is-important/coverage-protects-you](https://www.healthcare.gov/why-coverage-is-important/coverage-protects-you). Please consider that a consumer with low literacy and/or low health literacy may not understand written materials. Assisters should provide alternatives like pictures and audio recordings.

If consumers are already enrolled in Marketplace coverage, assisters can help consumers learn how to use, maintain, and renew their coverage and update their application if they experience certain life changes.

There may be times when assisters interact with consumers who will be able to understand and speak English well but may not be able to read and write in English. In this case, assisters will need to identify and provide materials in the consumers' preferred languages.

There are specific Marketplace considerations for some underserved consumers. For example, if an assister conducts outreach activities in an area where there is a large American Indian population, the assister should emphasize all the protections and benefits the ACA provides this population (for example, the zero cost sharing plan variation available to them, and their ability to change plans once a month).

Assisters may benefit from working with a Champion for Coverage. These are national or local organizations representing under- or un- insured communities. These organizations are active in providing outreach and education about the Health Insurance Marketplace<sup>®iii</sup> and how consumers can enroll in health coverage through HealthCare.gov, Medicaid, or CHIP. To learn how to get involved and to find resources and educational products to help consumers get or keep health coverage, as well as customizable outreach materials for your organization, please visit [Champions for Coverage](#).

## Outreach Resources

[Champions for Coverage](#)

[Partner tools and toolkits](#)

[DIY Marketplace toolkit](#)

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<sup>i</sup> 45 C.F.R. § 155.210(d)(6)

<sup>ii</sup> 45 CFR § 155.210(d)(8)

<sup>iii</sup> The Health Insurance Marketplace<sup>®</sup> is a registered trademark of the U.S. Department of Health & Human Services.

