

Question & Answer for Member Engagement Webinar 1
Consumer Advisory Committees:
Recruiting and Retaining Members for Engagement
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Speakers

John Ruiz, Commonwealth Care Alliance
Jacqueline Dowdy, Neighborhood Health Plan of Rhode Island
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Incentives

Q: Are stipends being provided to dual eligible members? What about the yearly Medicare spending limit? We're heard from our compliance team that we can't give stipends secondary to these guidelines.

In California, Public Authority Advisory Committees are not able to use MediCal funds to pay for refreshments, not even water. How do you pay for them?

A: John Ruiz: A stipend is not a marketing strategy to get people to stay enrolled in the demonstration. We feel strongly that people's time is valuable, and one way we value their input is by paying them for their time. We did have questions about how that might affect their eligibility for public assistance programs like Medicaid. It turned out that the \$100 a year they receive for participating in the committees doesn't affect eligibility because it's not considered taxable income. It becomes taxable only if it exceeds \$600 per calendar year (which would generate a 1099 form). To me it's a moral issue. To this date I haven't heard about or seen any regulation that says we can't make this payment.

One more thing I wanted to add--we have members sign an attestation that states how their eligibility might or might not be affected by the stipend, that their participation in the advisory committees is voluntary and the \$25 they get per meeting is not an incentive for them to stay enrolled in the One Care program, they can leave the advisory committee or disenroll from the program at any time.

Jacqueline Dowdy: We also had that question, because we don't want to do anything against the rules. Right now we're in phase one of the demonstration project, and we don't believe we are doing anything against the rules, because the Medicare portion is not in plan yet, but we also look at these individuals as employees. They are consultants who come to us with ideas. They help us to make the plan a better plan, not just for themselves, but for the other 170,000 members that we serve. We too look at it as though we're paying them for a job that they do.

Q: Where do the funds come from to provide the stipend for attending the meeting?

A: Jacqueline Dowdy: The funds that are used to pay stipends to our members comes from Administrative per member per month (PMPM) dollars.

Q: What meals do you provide? Is there a dollar limit?

A: John Ruiz: We provide lunch at every meeting. The dollar limit is \$7 to \$8 per person.

Q: Can you describe in what form you provide the stipend (e.g., cash, Visa gift card, Wal-Mart gift card, etc.)?

A: William Dean: Most plans that provide a stipend do so in the form of a check, sometimes after collecting either an IRS Form W-2 and/or an attestation from the Consumer Advisory Committee member indicating that check is not an inducement to enroll or remain enrolled in the plan. It is about paying people for their time.

Meeting Content

Q: How do you determine topics for educational activities?

A: John Ruiz: We determine topics in two ways: we ask members what they want to learn more about, and we ask plan management for topics they have questions about. For example, if plan management wants to know more about the member experience with our pharmacy department, we give members an overview of the pharmacy program and then ask a specific set of questions, like whether they get their medications on time, how are their medications delivered, how they get to the pharmacy, what do they do when the pharmacy needs a new prescription? In the process, members learn a lot about the pharmacy rights, like the right to request a medication not on the formulary and what form to use to make that request.

Jacqueline Dowdy: One way is that our vice presidents provide us with a question which we then send out to the members of the group. That sparks conversations and that's where we get a lot of our issues from. The other way is that each meeting is a follow-up from the last meeting, so there are always issues from the previous meeting that we are able to discuss and provide answers.

Q: How do you handle consumer complaints about providers?

A: John Ruiz: Members need to know that the role of the advisory committees is NOT to process complaints per se. Complaints are okay to talk about at the meetings but should be in the context of determining if there are common themes or systemic issues that need to be addressed. It is important for members to utilize the organization's mechanism for handling complaints (member services department) for resolution. This is also a way for us to test our complaints procedures and Member Services in general. Additionally, members shouldn't wait until the next advisory meeting to file complaints because often by then it's too late to resolve them.

Jacqueline Dowdy: We direct our members to contact Member Services with all provider complaints. All of the issues brought to our Member Advisory Committee meetings are then brought to the business owners for follow-up. These issues are brought to them in a meeting we host monthly called Member Satisfaction Workgroup, (MSW). Through this meeting, business owners are held responsible for improvement activities.

Q: Can you talk more about what makes these meetings meaningful, as well as some positive outcomes from the meetings? This contributes to good retention of the members.

A: John Ruiz: There are various things that make the meetings meaningful: closing the feedback loop by reporting findings to the organization's senior managers and, in turn, management's response to the member feedback; the peer element of the meetings; the meeting structure and process; the educational opportunities (they learn something new at every meeting); and the 'giving back to the community', which is the motivation many have expressed as the reason for joining.

Meeting Logistics

Q: How do you keep the committee engaged for three hours? This seems to be a long time for someone who may be disabled.

A: John Ruiz: All of our members are people with disabilities (some with complex disabilities) and they don't seem to mind the long meeting at all. I've yet to hear a complaint about the length of the meeting; on the contrary, sometimes we have to remind them that it's time to leave and catch their rides back home. Members stay engaged because we go in with a packed agenda, e.g. review of minutes from the last meeting, old business not completed at the last meeting, invited speakers, focus-group questions from management, open forum, etc.

Q: How long does it take to establish a sustainable Consumer Advisory Committee? Our plan is about a year old and while we have had multiple meetings, the attendance has varied and we have not always had consistent attendees.

A: John Ruiz: You will always have people who come and go, but I think that if you employ group-building activities you can affect how people bond in the group, which will go a long way in keeping people engaged. In two of our advisory groups people look forward to attending the meeting. They've bonded as a group. In fact, one of those groups wants to meet every month because they want to see each other every month. I think it's important to promote the bonding of the group, that people really look forward to the meetings, that the meetings are orderly, and that people aren't personally attacked.

Jacqueline Dowdy: We have found here at Neighborhood that these people that sit around this table for us bi-monthly would prefer to meet monthly because they enjoy the company of each other, and myself and Ken. We don't talk down to them. Everyone in this room is an equal, and no one is better than the next person. Everybody's questions are answered, but if we don't know the answer for you today, we will get it and we will bring it back to you. We make ourselves available to the individuals in each of our groups, and they know if something is going on or if they need someone to speak to, they can pick up the phone and call myself or Ken, and we're going to help them to get the answers to the questions they may have. I think that goes a long way. It lets them see that they are not tokenized, that we're listening to everything they tell us. We're seeing what we can do to make things better for them and for the rest of the folks on our plan. I think they appreciate that.

Q: What is the total dedicated staff responsible for the advisory committee work?

A: John Ruiz: One full-time employee.

Q: Do you get consumer advisors who are leaders of community groups who see themselves as speaking for their group members?

A: John Ruiz: Not yet but it's likely to happen. There are pros and cons to this. On the one hand, those types of members can bring information from the advisory committees back to the community, which is good; on the other hand, they might monopolize the meeting unless they are not well managed by the facilitator. The facilitator needs to equalize meeting participation.

Q: How do you address language access barriers in consumer engagement?

A: We have an obligation to provide language interpreters, including American Sign Language, if needed.

Q: What is the age range of participating members? Do you have caregiver participation?

A: John Ruiz: Ages range from 20s through 60s. We currently don't have caregivers in our groups but they are allowed to participate.

Q: You mentioned your members are limited to participating in the Consumer Advisory Committee for two years, but the member can rejoin later. Can you give an example of when that person can rejoin? Do you have to sit out for two years and then come back?

A: Jacqueline Dowdy: It depends on the specific situation, but the way we generally do it is that they're on two years, they must go off for two years, and then they can come back on for two years. All members are given an Advisory Committee Member Expectation Sheet. In this document, it provides members with what is expected of them, as well as what they can expect from the meetings. This document also states that "Members are appointed for a two year term; Members may be reappointed for a second consecutive two year term at the discretion of the Member Advocate and Senior Manager of Public Affairs." We are currently in year one of the document, so in one year we will decide which individuals may stay for an additional two years.

John Ruiz: It depends on the demographics of the new applicant pool; if an applicant represents a group not yet represented in the committee, we would prioritize that applicant over a member whose two years have expired. By the same token, if the departing member leaves a gap in representation, we invite them to stay on board. We strive to have balance member representation in terms of race/ethnicity, age, gender, disability type and sexual orientation.

Processes

Q: With the CMS definition of grievances being "any expression of dissatisfaction", should any "personal stories" from consumers that reflect dissatisfaction with the organization trigger a process of ensuring that consumers get their rights information (i.e., Quality

Improvement Organization information)?

A: John Ruiz: Absolutely, but first we make sure that the member has spoken to Member Services and their care manager as these are their primary points of contact regarding dissatisfaction. Then, when we debrief the advisory committee meetings with management, we discuss member dissatisfaction in general and what the organization might do to improve the member experience. For example, members complained about not knowing who their care manager was, so we created a form letter that care managers must send whenever a member is assigned or reassigned to them along with their contact information.

Q: For plans covering large geographic areas, how do you link multiple sites together for one meeting? How can you bridge engagement from a local community level to a much bigger multi-county contract?

What approaches do you suggest when conducting Consumer Advisory Committee meetings with geographical diversity (i.e., rural versus urban participants)?

A: William Dean: While there is no easy answer here, we recommend having small, regional consumer advisory committees (1-4 members), within larger geographic areas, whose leader or chairperson participates in the centralized consumer advisory committee. As an alternative, the plan may choose to allow committee members who live far from the meeting location to call into the meeting. In this case, there are several ways to make this work:

- 1) develop a roster (with photos and short bios) of the consumer advisory committee members to foster a connection between those who meet in person and those who call in;
- 2) ensure that everyone can hear and be heard by the off-site members (use speakers and microphones; ask people to speak clearly; use video conferencing like Skype if possible); and
- 3) bring off-site committee members to meet the rest of the committee membership at least annually. If this isn't done well, it will hamper full and sustained participation, so it is a good idea to check in with the entire consumer advisory committee membership on ways to improve the process.

Q: What was the timing of launching the Consumer Advisory Committee relative to the launching of your programs? Did you operate your program prior to bringing up the Consumer Advisory Committee, or did you initiate the Consumer Advisory Committee and have that Committee in place as you launched your program?

A: John Ruiz: We waited until 3 months after program implementation. We didn't have access to enrollee information before that, and then we had to wait until enrollees had had some experience with our services and an opportunity to experience the system we put in place in terms of member services, assessment, care planning, care management, etc.

Q: Can you provide more detail on consumer representative training, specifically as it relates to eliciting broader consumer input and representing consumer interests effectively?

A: William Dean: Our curriculum includes training, discussion, and activities (including role plays) that help members understand and value their role on the Consumer Advisory Committee as “ambassadors” for others enrolled in the health plan. Certainly, it is important that committee members share their personal stories so the health plan can help them on an individual level. But it is equally important that committee members move beyond themselves to the broader community of people served by the plan, so that greater systemic improvements can be made that affect everyone.

Q: Overall, the Consumer Advisory Committee meetings seem extremely successful. Are there still challenges that you may experience?

A: John Ruiz: It's not perfect and there are many challenges: scheduling meetings around members' schedules; meeting attendance; recruitment and retention; managing expectations on what the plan can and can't pay for; personality clashes among members; timely transportation to and from the meetings; keeping the meetings on point.

Jacqueline Dowdy: One of the challenges we would like to see less of is involvement from senior leadership. Although we do receive good follow-through from and improvement activities from middle management, we cannot say the same for individuals on our senior leadership team.

Q: How do you address the challenge when issues discussed by our group and the recommendations made are not quickly answered? We can make those recommendations out to the various entities, but as an organization we can't change a plan or coverage or anything in a short period of time, which I am concerned will be frustrating for the members.

A: Jacqueline Dowdy: The information brought to our meetings is brought to what we call a member satisfaction workgroup. This member satisfaction workgroup is made up of every department in our organization that touches a member. We find that when we come back to that next meeting sometimes we can't say "They thought all of your recommendations were great, and they're going to do them," but there are bits and pieces that the group may or may not agree with and we share that with the members. Then we go on to discuss what can we do to make it better. You're right, though that it can be frustrating, not only for the group, but for the facilitator as well.

John Ruiz: I'm really honest with the groups. One of the things I say if there isn't a quick response is that, in our organization, there are various departments that are impacted by any decision or a change in policy or procedure, and the organization needs time to learn what impact the change will have across all departments. These things take time. Then, once a decision is made, it gets communicated to the committee at the next scheduled meeting. That has worked really well for us.

Recruitment

Q: Are the advisory committees open for any member to join? Once a person joins, what is the expectation of their participation (e.g., one year, two)?

A: John Ruiz: Any member can apply, but members have to fill out an application and go through an interview before being selected. We do this to better understand applicants' motivation for wanting to be involved and whether they can commit to a two-year membership.

Q: We have a strong participatory Consumer Advisory Committee, but our challenge has been recruiting members with substance use disorder. Do you have any recommendations for recruiting members with substance use disorders?

A: John Ruiz: We have several members with substance abuse disorders that were recruited based on their rating category (in our program, rating category 2 stands for people with Behavioral Health diagnoses, which includes substance abuse disorders). For our initial recruitment we reached out to members of all rating categories. Also, we networked with organizations that serve this population, and disseminated advertising materials across community-based agencies that serve our members.

Transportation

Q: Is the transportation you arrange for your members public or do you have a transportation service? For example, with cab companies, do you have a contract with these providers?

A: John Ruiz: The transportation we arrange is through contracts with transportation companies, and members have to call our member services department at least 48 hours in advance to make arrangements. Our member services department has a list of all the advisory committee members so there's no question about whether or not to approve the request. That said, some of our members use public transportation in metro areas, while others have their own wheels for which we reimburse for mileage, tolls and parking (if applicable).

Q: What standards do you use to reimburse for transportation?

A: John Ruiz: For automobile mileage we use the same reimbursement rate that our employees receive. For bus or train we reimburse dollar for dollar.