Project Management (And Other) Lessons learned from Oregon Health Authority Community Partner Workgroup HB 4035 (2022)

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Project Management (and Other) Lessons learned from Oregon Health Authority (OHA) Community Partner Workgroup HB 4035 (2022)

1. Discuss role of project management in legislatively mandated workgroups. How PMs can support state agency action on recommendations and agency implementation.

2. Challenges and opportunities for state agencies in community co-creation. The role of project management.

3. Tools for project managers: OHA draft workgroup toolkit

Background

- Affected 1.5 Million Oregonians
- Annual Medicaid eligibility suspected during COVID
- Critical to design within context of OHA's Goal to eliminate health inequities by 2030.

Report [link](#)

Unwinding the Federal Public Health Emergency

HB 4035 Report

March 1, 2023

Project Managers essential when workgroup 1st identified

SECTION 3. (1) The Oregon Health Authority, in collaboration with the Department of Human Services and the Department of Consumer and Business Services, shall immediately convene a community and partner work group to advise the authority and the departments on the development of outreach and enrollment assistance and communications strategies, within the authority's legislatively approved budget, to communicate and assist medical assistance program enrollees in navigating the redetermination process and the enrollees' transition to new not the ealth insurance or oher cverae.

(5) The authority shall incorporate the recommendations of the work group into the reports described in section 2 (3) and (5) of this 2022 Act.

Project Management role in legislatively mandated workgroups
CPWG Responsibilities & Scope

Purpose

The workgroup advised OHA on outreach, enrollment and communication strategies to:

- help people currently receiving OHP navigate the changes (redetermination process), and

- maximize continuity of coverage for as many people as possible

Scope

Recommend and provide advice to OHA on strategies for:

1. Obtaining and updating member contact information

2. Outreach and communications regarding the redetermination process and availability of navigator assistance

3. Maximizing awareness of and utilization of navigational assistance

4. Other strategies for redetermination to minimize loss of coverage

5. Maximizing use of CBOs and other organizations to provide navigational assistance

Community Partner Workgroup Membership

Members represented from the following sectors:

- Community partners
- Current OHP members or individuals who have been enrolled in OHP in the last year and have transitioned to the Marketplace, private insurance, Medicare, or who have lost health insurance coverage
- Representatives of impacted health systems with a focus on representation from across the state (CCOs, hospital systems, clinics)
- Representative of organized labor
- Tribal representative (appointed)
- Representative from the Medicaid Advisory Committee (appointed)
- Representative from the Health Insurance exchange Advisory Committee (appointed)

Challenges & Opportunities:
Project Managers role in creating a space for community wisdom to be heard and acted upon

Community Partner Workgroup Facilitation & Member Support

Creation of a welcoming space

Know members by name

Introductions and addressing needs/accommodations needed to participate fully

Watching participation in the meeting, allowing space and providing opportunity for all members to share feedback as well as elevating certain members for specific topics

Member Support

Timely distribution of materials in advance of meeting and post-meeting

Limiting of outside-of-meeting tasks for members

Staff available to provide individual support and clarification to members

Member-led creation of agenda and discussion topics

Partner Engagement: PM's supporting shared power to highlight and elevate community wisdom

- Bringing workgroup input, voice, questions and recommendations internal to agency operations and policy

- Public facing website with transparent information about workgroup (meeting notes, charter, PowerPoints, etc.

- Public facing webinars: role of CPWG recognized as formative

- Contracted Communications: Vetted work through CPWG

- Pre-meetings with internal agency Subject Matter Experts to prepare for workgroup

- Legislative reports

Recommendations and Agency Implementation: Growing workgroup ideas into agency action

Guiding Values for Prioritizing CPWG Recommendations

9 guiding values in areas prioritized by workgroup.

63 specific recommendations.

Review all values and recommendation here.

- ONE System Improvements
- Communication Strategies and Priorities
- Navigating Insurance Transitions
- Community Partners
- Data and Dashboard Reporting
- Accessibility and Disability Access
- Language Access/ Language Justice
- Unhoused Populations
- Migrant and Seasonal Farmworkers

Broad Overall Value

Focus on improving the Oregon Eligibility (ONE) system and OHP renewal process. These long-term improvements go beyond the end of the COVID-19 Public Health Emergency. Make changes to:

- Increase passive renewals.

- Provide more ways for members to get help without contacting ODHS. Examples include community partners or ONE system enhancements.

- Increase call center hours and staffing so that members can get help when they do need to call

Language Access, Language Justice

The CPWG recommends that OHA and ODHS frame **Language Access** as language justice and equip staff and those serving individuals going through the redeterminations process with resources and tools to offer the assistance and support in the preferred language of the member. This includes communicating information and distributing materials in the member's preferred language.

OHA Community Co-Creation Lessons Learned: Agency response and follow-up to the 63 Recommendations

Challenges and opportunities for state agencies in community co-creation. The role of project management.

Community Co-Creation Lessons Learned

Challenges

- Cultural shift in how to do work at in state agencies
    - Talking transparently about challenges
    - Involving community *before* we know the answers
- Acting operational actions guided by community
    - Staffing and time-intensity to *staff workgroup*
    - Lack of operational tools and project management to *implement recommendations*

Opportunities

- Internal agency champions – needed within each implementation area
- Continuous community engagement and continuous action and responsiveness
- Values from community as driving direction
- Documenting best practices for future work

Community Co-Creation Lessons Learned
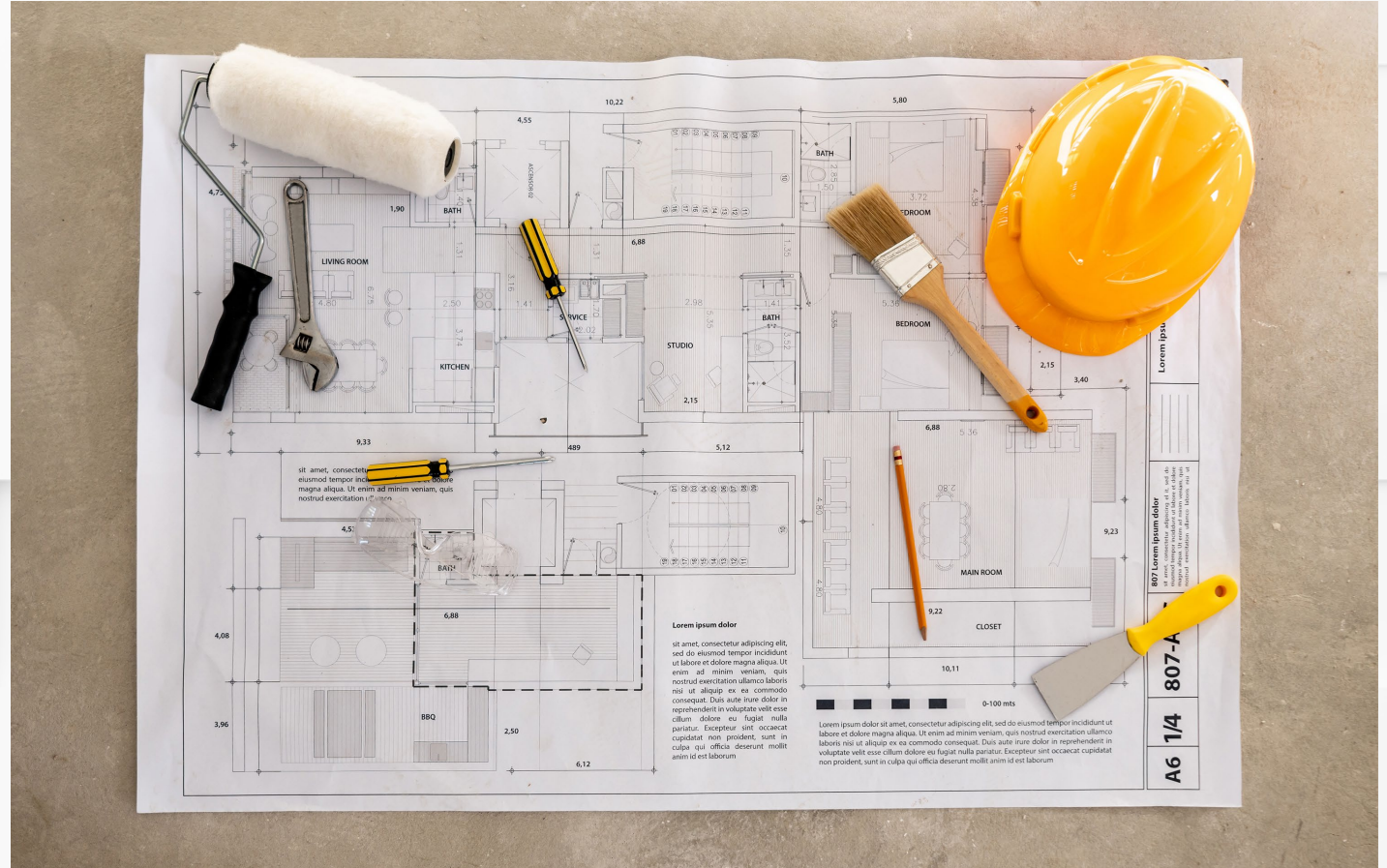

Opportunities

- What other opportunities did you hear through workgroup implementation?

Challenges

- What other challenges did you hear from today's presentation about implementing this workgroup?

New agency draft tool for workgroups from lessons learned.

Resource: Workgroup Toolkit to elevate community voice into state operations and policies

Workgroup Toolkit

This interactive toolkit includes actionable steps, tools, and tips staff can use during the various phases of a workgroup's lifecycle. Each section includes similar formatting (e.g., elements in the picture below) and clickable content that opens specific templates, samples, and other resources.

Section II: Designing Workgroups

| Section 1 | Section 2 | Section 3 | Section 4 | Section 5 | Section 6 | Section 7 |

This section covers the basics of how to design workgroups in alignment with their intended purpose, scope, and scale as defined by legislature and with a clear commitment to accessibility and equity. Staff can use this section to plan for and design a workgroup by answering key questions related to governance, purpose, staffing, and related topics.

Steps

- ☑ **Outline and/or define purpose and scope of the workgroup**
  - ☑ If provided by legislature, use and expand mandate
  - ☑ If not provided, define based on overall objectives and desired outcomes
- ☑ **Establish Governance**
  - ☑ Identify sponsors and approving authorities
  - ☑ Collect approvals from governing authorities
- ☑ **Calculate staffing and membership levels**
- ☑ **Draft the workgroup charter, to finalize in Section IV** (use Charter Instructions and Template)
- ☑ **Draft Recruitment Plan, to activate in Section III**
- ☑ **Identify and acquire tools and services to support accessibility, equity, and inclusion**

Tools

Templates
- Workgroup Charter
- Recruitment Plan

Samples
- CPWG Charter
- CPWG Recruitment Plan

Resources
- Charter Instructions
- Worksheet 1: Calculate Staffing and Membership
- Equity and Inclusion Best Practices

Tips

- 💡 To best position your workgroup for success, calculate ideal vs. realistic staffing levels based on the scale and impact of the workgroup's charge.
- 💡 No two workgroups are the same. When building your charter, go beyond the template by asking specific questions and including unique elements that will best serve your workgroup's needs.
- 💡 Build feedback loops into the Workgroup Charter to make sure you are collecting and applying feedback throughout the life of the workgroup.
- 💡 Design your workgroup with accessibility and inclusion in mind by referencing the OHA equity policy and including its directive in the charter and other plans.

Navigation bar

Staff can use the Navigation Bar to quickly identify and click on the desired section.

Steps

Each section includes step-by-step activities with check boxes to help staff track their progress.

Tools

Tools are listed by type (e.g., template) and hyperlinked.

Tips

Staff can scan and select leading practices to use for each activity.

Access this tool on the ERD OWL site.

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- ☑ **Calculate staffing and membership levels**
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- ☑ **Draft Recruitment Plan and Workgroup Timeline,** to activate in Section III
- ☑ **Identify and acquire tools and services to support accessibility, equity, and inclusion**

Tools

🗎 Templates

Workgroup Charter

Recruitment Plan

Workgroup Timeline

⬨ Samples

CPWG Charter

CPWG Recruitment Plan

CPWG Timeline

📊 Resources

Charter Instructions

Worksheet 1: Calculate Staffing and Membership

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This section contains the complete list of referenced material throughout the toolkit as well as high-level, overarching OHA resources for best practices and policy.

Resources

Charter Instructions

Worksheet 1: Calculate Staffing and Membership

Worksheet 3: Team Building Activities

Workgroup Meeting Planning Guide

Workgroup Interest Sign-up Link

Accessibility Resources

Accessibility Checklist

Community Engagement Strategies Checklist

Creating Accessible Presentations

OHA Guide for Facilitating Inclusive Virtual Meetings

State of Oregon Website Guidelines

Equity Resources

Equity Survey Instructions Language

REALD Equity Survey Form

Equity Gap Analysis Tool

Language Access Services

OEMS Guide to Facilitating Inclusive Virtual Meetings

Compensation Forms

2023 Compensation Guidance and FAQ

2023 Compensation Submission Form v2

2023 Compensation Recruitment Form

EFT Enrollment Form

Fillable W9

Additional Resources

HOP Workgroup Processes

OHA Boards and Committees

Questions?